

Milestones Simplicity 2010

User Manual

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Chapter 1: Introduction

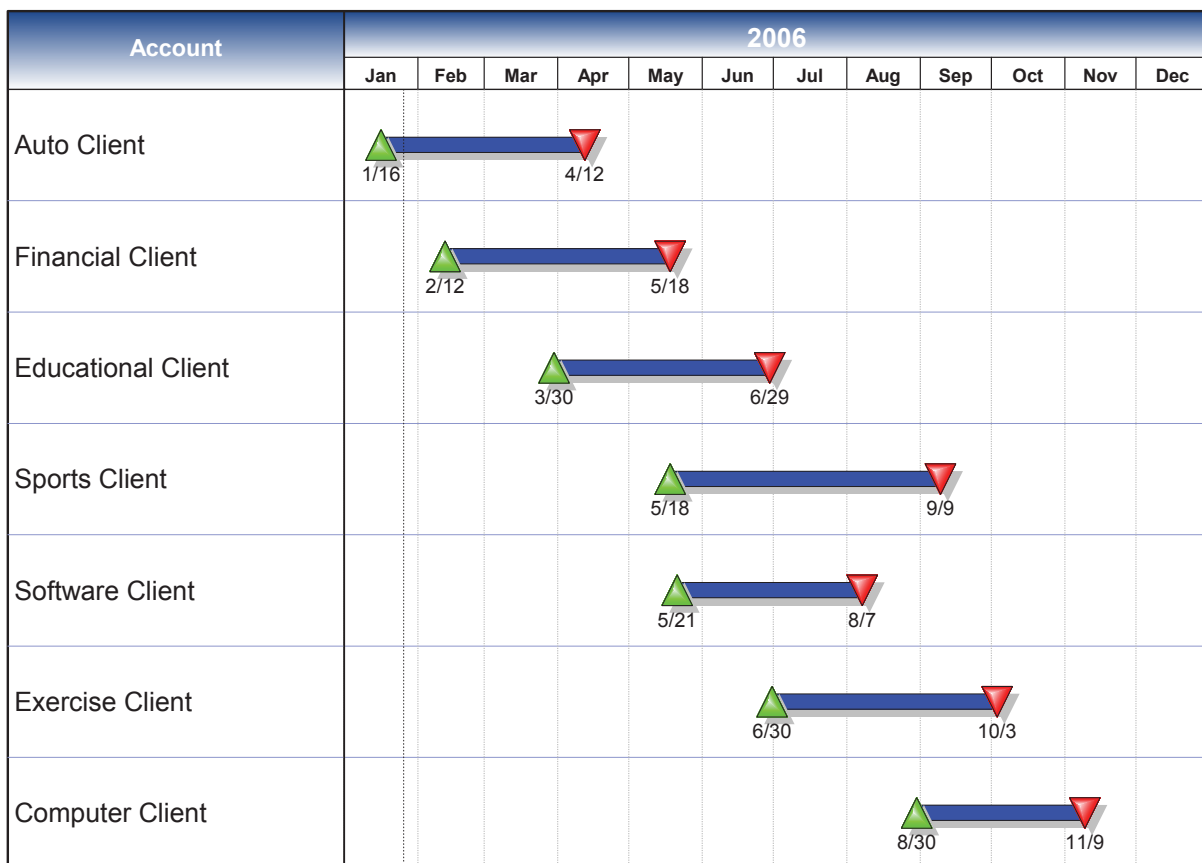
Easy-to-use, Basic Scheduling

Milestones Simplicity makes planning and communicating your projects fast and easy. Designed for anyone who needs to create basic Gantt charts, Milestones Simplicity makes fast work of your scheduling efforts.

Click-and-drag to build schedules

If you know how to use a mouse, then you can use Milestones Simplicity. That's because Milestones Simplicity uses the same simple click-and-drag technique you're already familiar with. You can click-and-drag your way through even the most detailed projects in minutes!

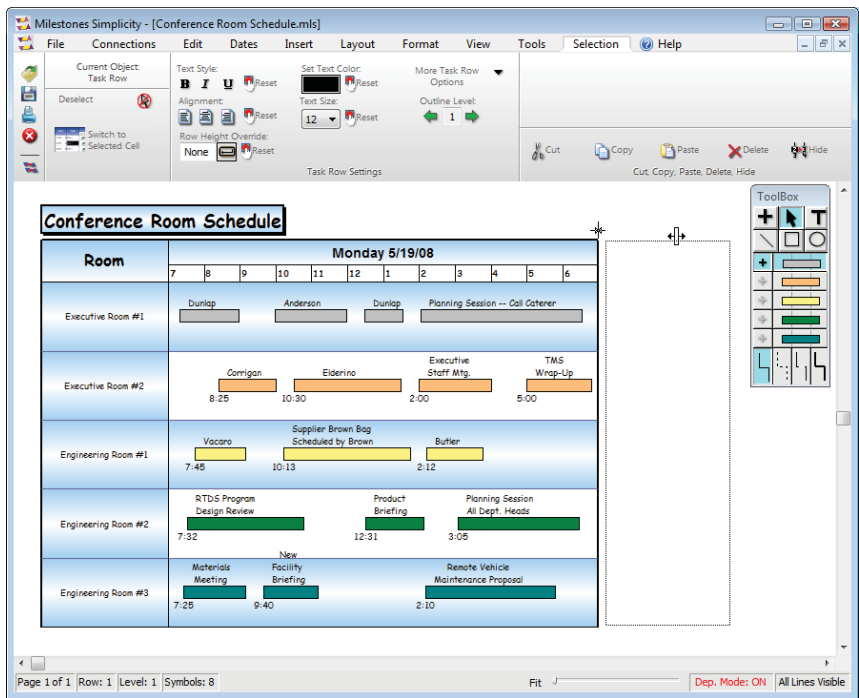
Account Manager Client Tracking Schedule



Make changes in seconds

With Milestones Simplicity, you'll find that it's a breeze to update and change any existing schedule in seconds! Use  to change a date, move a task row, and more. See Chapter 2 for more information.

Below, a column is being dragged from the left side of the schedule to the right.



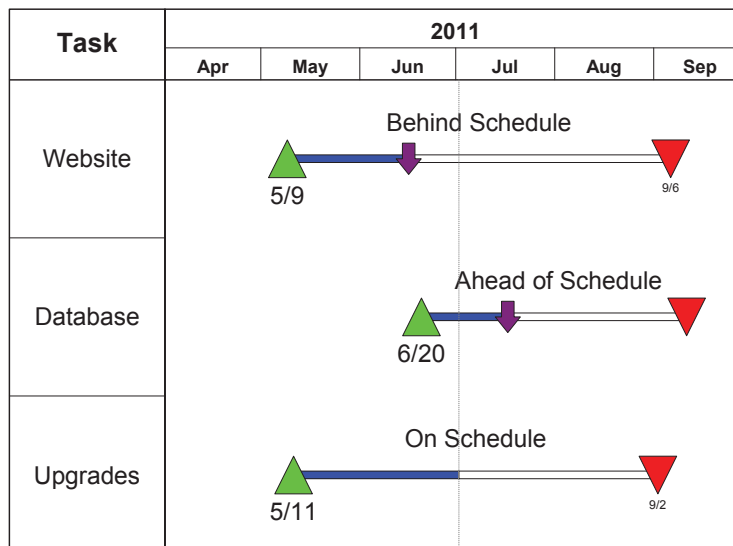
Organize your schedule with outlining

Milestones Simplicity offers an easy-to-use outlining capability. Organize projects into steps and sub-steps. Shade selected task rows, all task rows, or odd/even task rows. See Chapter 4 for more information.

Outline Level	Task	2005					
		Jan	Feb	Mar	Apr	May	Jun
1	Project A						
2	Task A1						
2	Task A2						
3	SubTask						
3	SubTask						
1	Project B						
2	Task B1						
3	SubTask						
3	SubTask						
2	Task B2						

Easily show progress

The Fill to Status Date feature is an easy way to show progress. When this option is turned on for symbols and/or Bars, the fill color will automatically change after the current date, as shown here. The fill color that appears after the status date is white. See *Chapter 2* for more information.



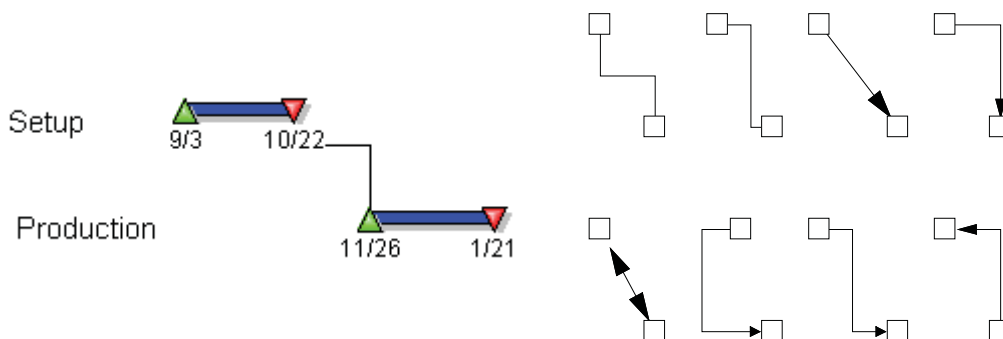
Individual tasks can be adjusted to reflect whether they are on schedule, behind schedule or ahead of schedule by entering the number of days the task is behind or ahead of schedule.

Dependencies

Easily create dependency relationships (predecessor/successor) between tasks. In the following example, Production cannot start until Setup is complete.

With dependency mode turned on, if the Setup end date is delayed, then the dependent task Production will shift by the same amount of time.

Tie the two steps together with a variety of Bars, just a few of which are shown here:

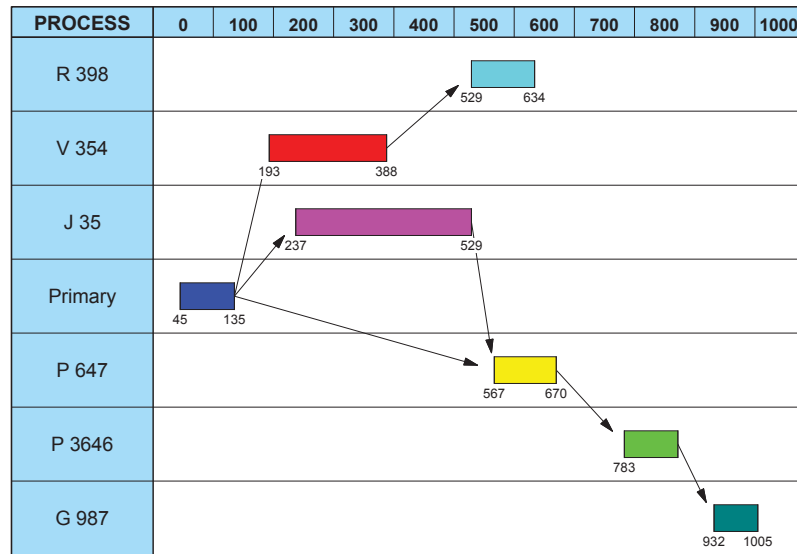


Up to 5 upward or downward “Bars” can be established from any symbol. This allows a manufacturing cycle schedule in which several processes are Bared, as shown below.

See *Chapter 5* for more information.

With dependency mode turned on, when the start or end point for the “Primary” bar is moved, all the other bars will move by the same amount of time.

Machine Cycle Schedule



SmartColumns

Any of the schedule's 20 possible columns can be a SmartColumn. These are columns that you designate for a specific use. These SmartColumn types are possible: Start Date, End Date, Task Number, and Outline Level, as shown below. *See Chapter 2 for more information.*

SmartColumns will automatically display information contained in and based on your schedule. Some SmartColumns, such as Start Date, when edited, will update the schedule.

Widgets-R-Us

Task No.	Outline Level	Task	2011							Start	End
			Jan	Feb	Mar	Apr	May	Jun	Jul		
1	1	All Projects								1/20/11	7/9/11
2	2	Project A								1/20/11	4/7/11
3	3	Task A1								1/20/11	2/16/11
4	3	Task A2								2/25/11	4/7/11
5	2	Project B								4/17/11	7/9/11
6	3	Task B1								4/17/11	5/13/11
7	3	Task B2								5/15/11	7/9/11

Calendar view

A monthly calendar view of important events can be generated for any schedule.

The schedule title and symbols, along with the text associated with the symbols, are displayed.
See Chapter 2 for more information.

Here is an example:

January 2008						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4 Find Location	5
6	7	8	9	10	11	12
13	14	15	16 Status-Part A	17	18 Dept meeting	19 Project A ends
20	21	22	23	24 Project B begin	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Easy Publishing, Presentation and Distribution

Milestones Simplicity offers many ways for you to distribute and present your schedules.

- Print your schedule to a variety of devices, from pocket-size to wall-size!
- Easily publish any single schedule for the Internet/Intranet.
- Include your schedules in other documents, such as PowerPoint presentations, Word or Excel documents, and even PDF files.
- Milestones Simplicity's free schedule Viewer lets others view schedules you e-mail to them or save on your company's server.

Include schedules in other documents

It's easy to include schedule pages in your presentations, reports, proposals, spreadsheets and more.

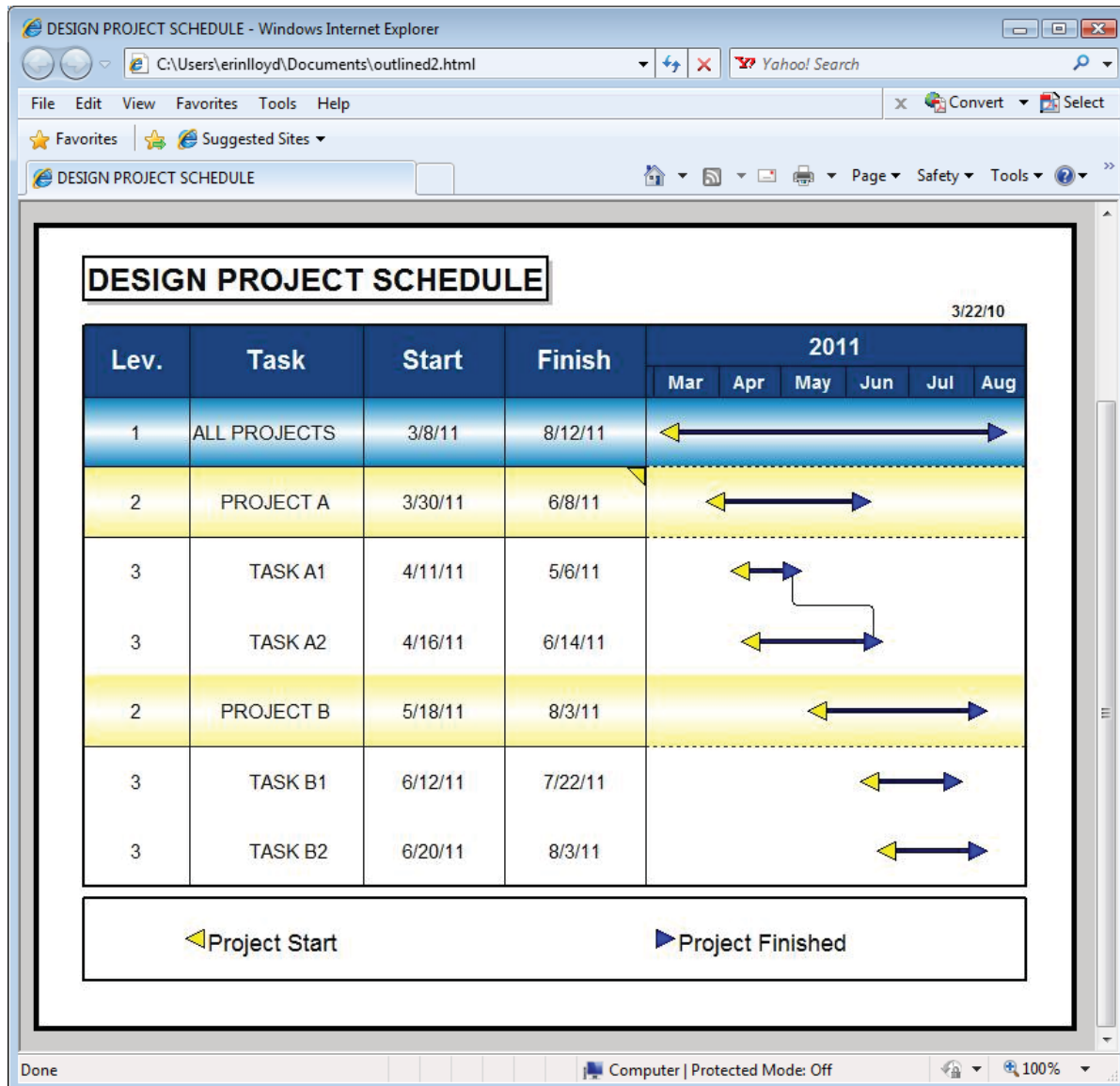
Just "Copy All Pages to PowerPoint" to instantly create a presentation; or, save to PDF for easy distribution. You can send these documents to others even if they don't have Milestones Simplicity on their system.

See Chapter 10 for more information.

Publish Internet-ready schedules

The Internet Publishing Wizard will guide you through producing an HTML file perfect for publishing on the Internet or your company Intranet. The HTML document contains a picture of each page of the schedule and, optionally, a table of schedule data.

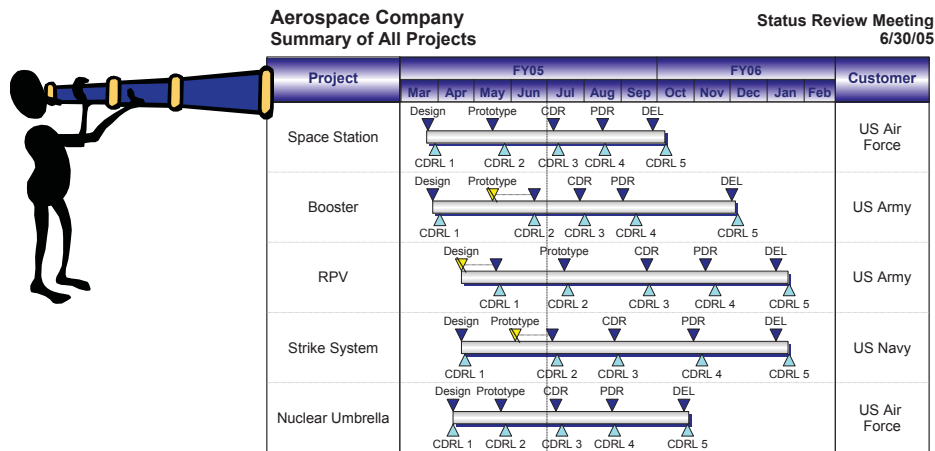
Or, just choose to create a picture of the schedule for distribution. See *Chapter 10* for more information.



Free Milestones Viewer

For those who need to view and print a Milestones Simplicity schedule without making changes to it, the Milestones Viewer is the perfect solution. A free Viewer is distributed with every copy of Milestones Simplicity. The viewer can be freely distributed to others who have a need to view schedules produced with Milestones Simplicity. The Viewer can also be downloaded from KIDASA's web site at www.kidasa.com.

E-mail your schedule as an attachment or keep schedules in a shared folder. Use the Viewer to open the Milestones Simplicity file to see the latest schedule update. Print the schedule, view symbol notes, and more. See *Chapter 10* for more information.



Find and replace text

Use Find and Replace to quickly make detailed text changes to large schedules. Apply Find and Replace to column text, freeform text, symbol notes, and symbol text.

Choose **Edit | Find, Replace, Go to Page | Find and Replace** to launch the Find and Replace dialog box.

Your last **Find and Replace** is saved and can be accessed by choosing **Edit | Find, Replace, Go to Page | Find again...**

Find and Replace

Section to Search: Column Text Only

The search always begins on the first page of your chart, unless you are doing a "Repeat Last Find".

Find What:

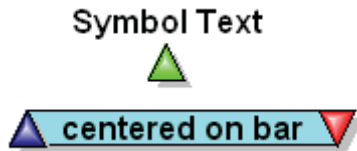
Replace With:

Complete Text Entry:

Extensive Text Entry and Graphics Options

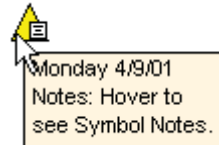
Symbol text

Enter up to three lines of symbol text. This text moves with the symbol. Position the text anywhere around the symbol or center it on the bar.



Symbol notes

Enter up to 10,000 characters in the symbol notes field. This text is embedded in the symbol, and appears when the cursor hovers over the symbol. Optionally, a separate notes page prints with the schedule



Freeform text

Type text anywhere on the schedule. Format the appearance of the text box. This text does not move with symbols or rows.



Column text

Use up to 20 columns to enter text, values, dates, and other schedule information.

Lev.	Task	Start	Finish
1	ALL PROJECTS	3/9/06	8/13/06
2	PROJECT A	3/31/06	6/9/06
3	TASK A1	4/12/06	5/7/06

See Chapter 2 for more information on adding and editing text.

Click and type

Quickly enter text by clicking a cell, a symbol, the chart title, a column heading, or free-form text, then start typing. The relevant dialog box launches as you type the text.

Spell checking

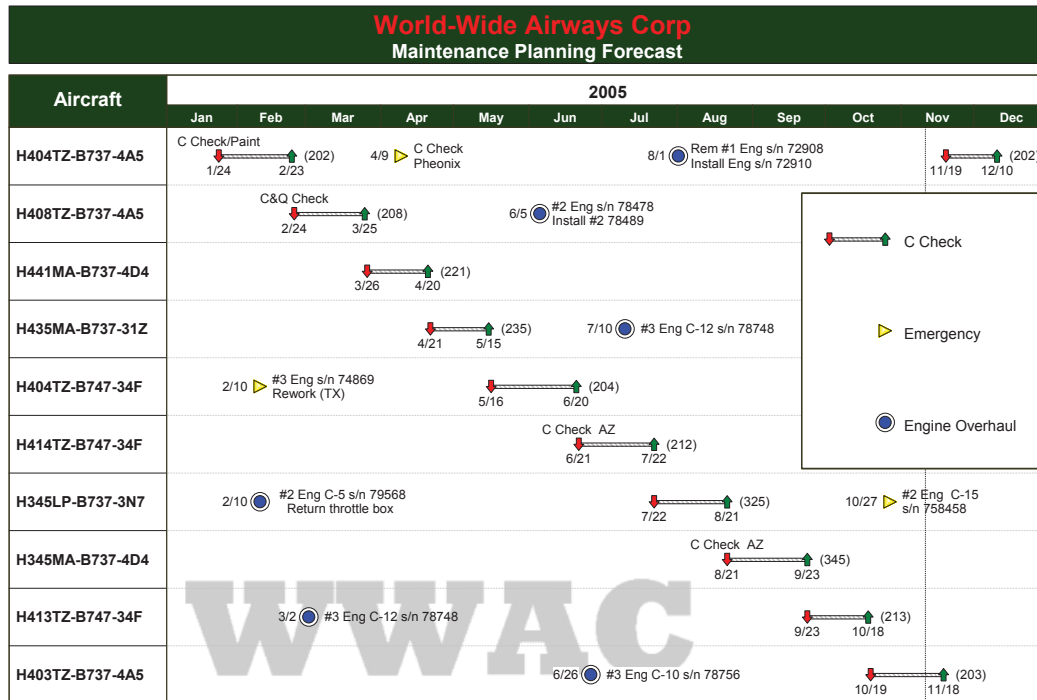
Milestones Simplicity has a built-in spell checker. All of the following languages are installed: English (United States), English (UK), English (Canada), French (Quebec), French (France), German, Spanish, Italian, Dutch, Swedish, Norwegian.

Graphics

Paste graphics anywhere in the schedule. Include up to 5 graphics in a template. Graphics can show on top of the schedule, behind the schedule information, and on all pages.

Graphics can be pasted in (via the Windows clipboard) or inserted from a file using one of these formats: JPG, JP2, PNG, DXF, EPS, IMG, WPG, PCX, TGA, WMF, TIF, and GIF.

See *Chapter 2* for more information.



Bookmarks

Add a bookmark name to any task row and then jump to that task row by choosing the bookmark name from a list of bookmarks.

The task row which is "jumped to" will be highlighted. Especially helpful in large schedules, this feature allows you to quickly jump to specific schedule areas.

Bookmarked tasks can show  indicators for easy identification.

Flexible Symbolology

Toolboxes

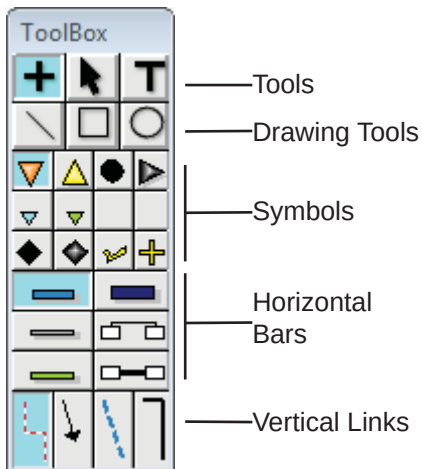
The Milestones Simplicity toolbox contains 3 tools, 32 symbols, 16 horizontal Bars, 8 Vertical Links, and 3 drawing tools to quickly build any schedule using the click-drag-and-drop method.

The Plus, Arrow, and Text tools exemplify the intuitive nature of Milestones Simplicity: Need to add a symbol or Bar? First click the Plus tool. Need to move a symbol on the schedule? First click the Arrow tool. Need to type text? First click the Text tool.

Two styles of toolboxes are available:

Standard Toolbox

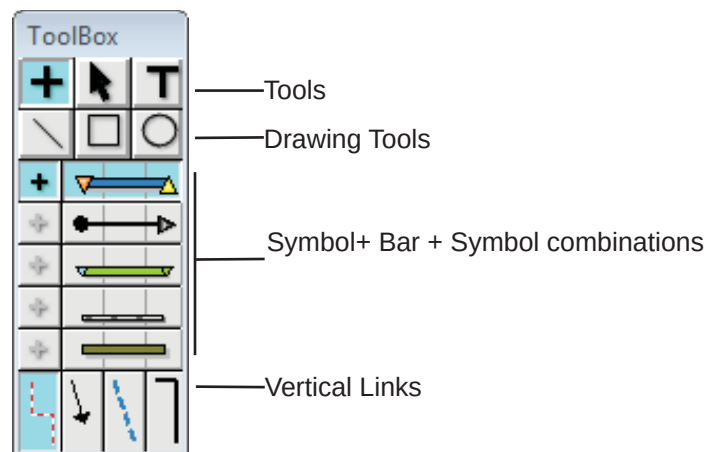
Symbols and Bars are separated. Symbols can be used by themselves or in any combination with bars and other symbols.



Combo Toolbox

Symbols and horizontal bars are combined in symbol+bar+symbol combinations. By using one of the small plus tools on the left to select a combination, you can quickly click-drag-and-drop a start symbol, bar, and end symbol.

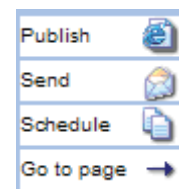
Symbols and bars can still be added independently.



Use the drawing tools to draw lines, arrows, circles and boxes. Format the color background, shape outline, fade effects and more.

Sidebar

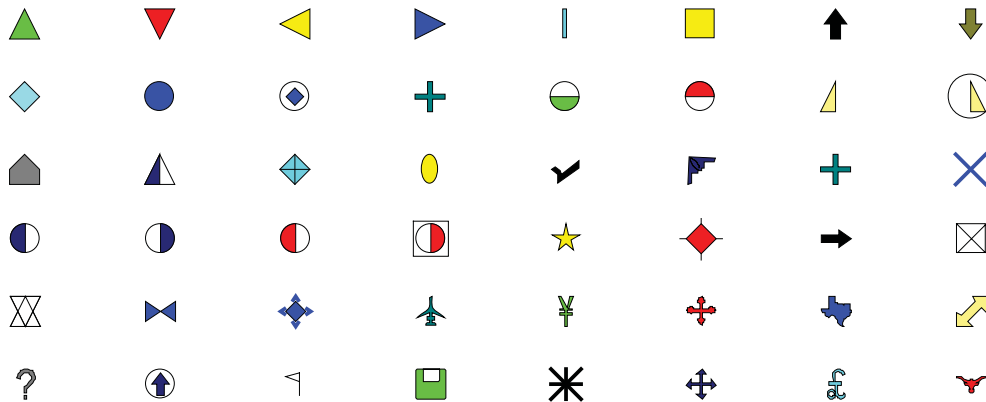
The optional sidebar is an extra toolbar anchored to the left or right side of the Milestones Simplicity window. The sidebar contains the toolbox (which is normally free-floating) and a user-defined list of shortcut buttons for a variety of activities, including navigating, sharing, and publishing your schedule.



See Chapter 3 for more information.

Wide assortment of symbols

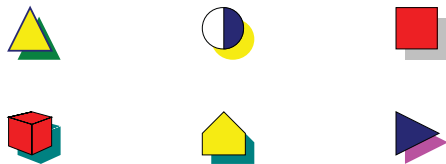
The flexibility and customizability of Milestones Simplicity symbology is second to none, with over 120 symbol shapes filled with any color.



Symbols can have any one of nine symbol “marking” patterns such as these:



Symbols can have a small, medium or large shadow of any color.



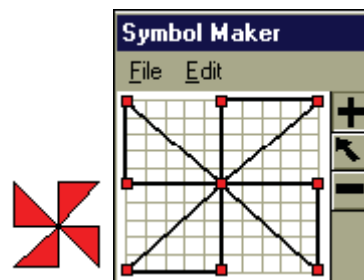
More formatting choices:

- Outline pattern
- Outline color
- Fill pattern
- Marking letters
- Custom size override
- Default text

User-defined symbols

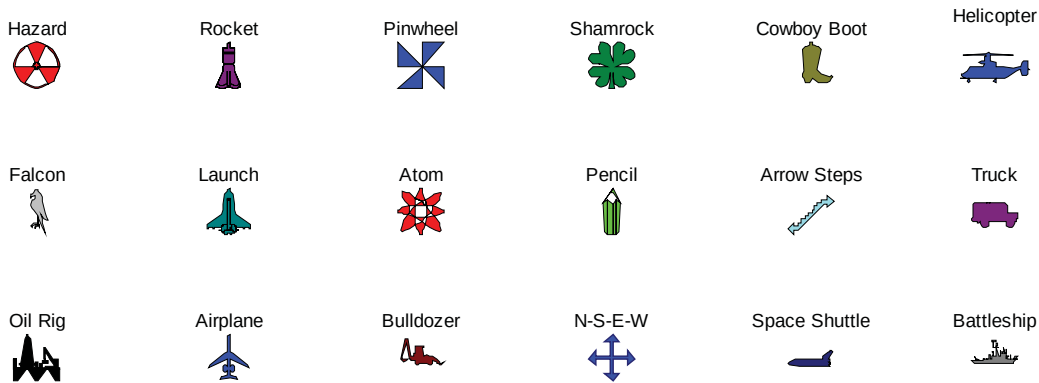
Not enough symbol shapes?

Milestones Simplicity has a built-in Symbol Maker that lets you design simple or multi-part shapes.



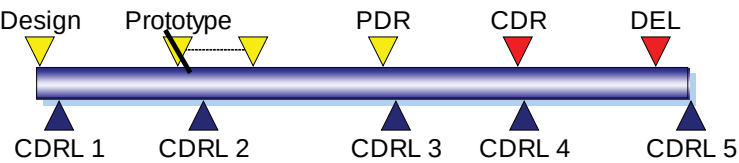
See Chapter 3 for more information.

If that's not enough, you can insert any bitmap symbol. Custom symbols can be embedded in the schedule, making distribution of the schedule easier.

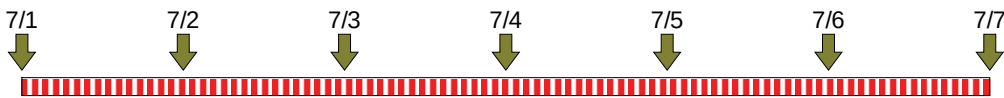


Multiple independent milestones

As many as 500 milestones can be added to any task row on your schedule. They can be stand-alone milestones or can represent a series of start and end dates.



You can have many milestones on a bar...

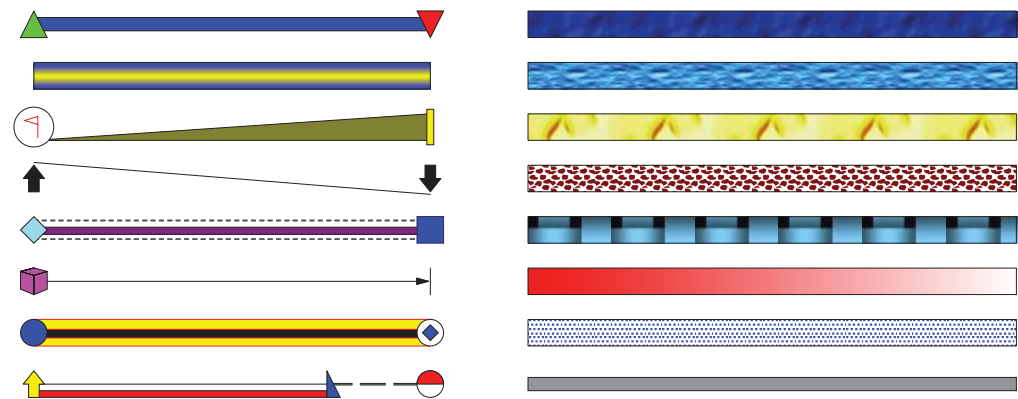


...or have many bars represent several sub-tasks, plus their start and end dates, on one row.

Tasks	January	February	March	April	May
Starter Prototype	Design	Develop		Test	

Huge variety of horizontal bar shapes

In addition to the many possible built-in symbol shapes, a large variety of horizontal bars and vertical links are included.



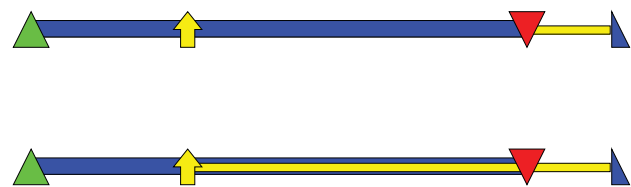
Three-level symbol and bar positioning

Symbols can be positioned at an upper, middle, or lower level on one task row. The bars automatically follow the positioning of the symbols.

In the example below, an otherwise dense and cluttered schedule is distinct and clear with three symbol positions and a variety of symbol date and text positions.

	2007											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overlapping Tasks												
Multiple Milestones												
Milestones and Task Bar												

Further customize bars with the “Always on top” setting to control which bar appears on the surface, as shown below:



See Chapter 3 for more information on symbol and bar positioning.

Flexible Formatting

You completely control the size and format of your schedules, including the physical page size of the schedule, the number and width of the columns, the number and height of the rows, the size of the optional legend, margin sizes and more. See Chapter 6 for more information.

Physical sizing

It is possible to create schedules...

...as small as a postage stamp...

Academic Scheduler											
Room	Days	Class	7	8	9	10	11	12	1	2	3
101	MON	ENG 101									
102	TUE	ENG 101									
103	WED	ENG 101									
104	THU	ENG 101									
105	FRI	ENG 101									
106	SAT	ENG 101									
107	SUN	ENG 101									
108	MON	ENG 101									
109	TUE	ENG 101									
110	WED	ENG 101									
111	THU	ENG 101									
112	FRI	ENG 101									
113	SAT	ENG 101									
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292											

Schedules can show standard time scales ranging from minutes to years, and custom, user-defined periods. Choose minutely, hourly, or daily for symbol placement; top and/or bottom of the schedule for date heading placement; and any period frequency (e.g. every 5 years). A few possibilities:

2004																											
January					February					March					April					May					June		
Q1														Q2													
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28

[illegible]

2000		2001				2002				2003	
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
FY01				FY02				FY03			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4

Templates retain the formatting (the “look” of a chart) while charts preserve schedule details (task row entries, dates, column value entries, etc.).

The working schedule (below, left) is instantly transformed into a stunning presentation schedule (below, right)—all with the use of a template. *See Chapter 9 for more information.*



Full international support

If English is not your language of choice, or if your preference is the metric measurement system, Milestones Simplicity can support you. It provides the capability to set up custom language templates for any language.

Milestones Simplicity also picks up your date format and measurement type choices directly from the Windows Control Panel Regional Settings.

ISO week numbering

Milestones Simplicity supports the International Standards Organization's standards for week numbering. The ISO week number heading type is available in our list of date headings.

Custom page numbering

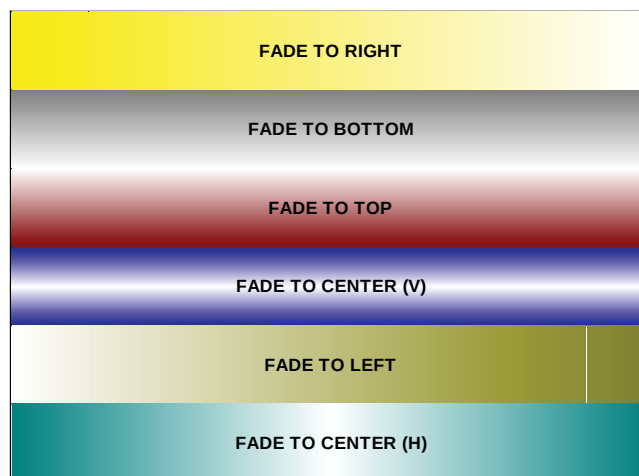
Customize the page number of a Milestones Simplicity schedule to match the pagination of your report, and then insert the schedule as a part of the report.

- Set the starting page number. "Page ___ of 6,000"
- Set the end display number. "Page 1 of ___"
- Exclude the standard "of..." phrase. "Page 1" instead of "Page 1 of 10"
- Set a page number prefix string. "Page 3-1" (the prefix is "3-")

Gradient fill patterns

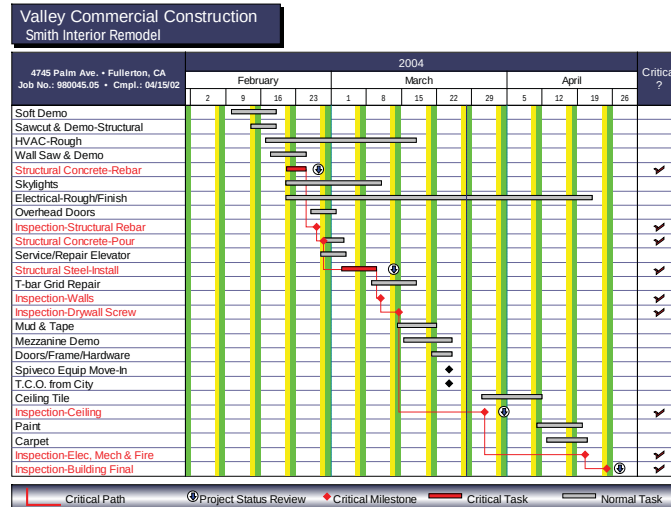
Gradient fills allow you to fade the background or fill color from one color to white.

These "special effects" can be chosen for many parts of your schedule, including bars, date headings, column headings, task shading, legends, and more.



Weekend shading

Saturdays and Sundays can be shaded in user-chosen colors.



More custom shading

Customize the background colors in a variety of areas:

- Odd or even task rows
- Selected task rows
- Columns
- Column headings
- Schedule background
- Schedule title
- Date headings
- Legend
- Drawn boxes
- Free-form text

Chapter 2: The Basics

This chapter contains valuable information concerning the basics of Milestones Simplicity- the layout of the screen, essential terminology, and some of the fundamental operations of the program.

More extensive and interactive documentation on these topics can be found in the **Help** menu under **Help Files | Help Topics**.

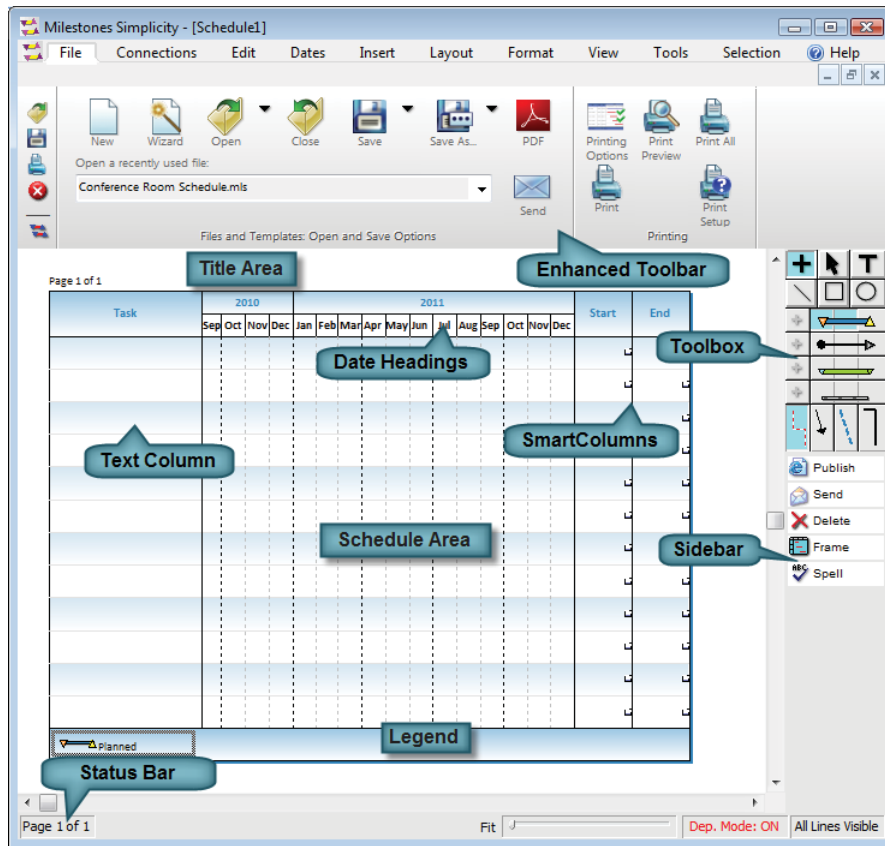
In this chapter you will learn about the following functions:

- The Milestones Simplicity Window
- Sidebar – contains the toolbox and extra shortcut buttons
- Toolboxes – The Combo Toolbox and the Standard Toolbox
- Toolbox “tools”
- Add symbols and bars using the toolboxes.
- Add vertical links
- Change the date of a symbol (move a symbol)
- Delete symbols, bars, and vertical links from the schedule
- Add text to the schedule – column text, symbol text and notes, freeform text.
- Customize a symbol in the toolbox
- Customize a horizontal bar in the toolbox
- Customize a vertical link in the toolbox
- Columns, column headings and task rows
- Schedule date range
- Date headings
- Current date and status lines
- Bookmark task rows
- Add graphics
- Keyboard shortcuts
- Right-click menus
- Schedule Setup Wizard
- Save a schedules
- View mode options

If you are a new user, the best way to learn how to use Milestones Simplicity is to go through each of the Tutorials located in the toolbar under **Help | Help Files | Tutorials**. These tutorials are designed to get you up and running smoothly.

The Milestones Simplicity Window

While using Milestones Simplicity, you will see a screen similar to the one below:



- The **Enhanced Toolbar** is used to access frequently used options.
 - The schedule **Title Area** can be used to provide your project title.
 - Choose from dozens of **Date heading** styles from minutes, years, or custom entries.
 - The **SmartColumns** automatically fill according to schedule data or entered data
 - The **Schedule Area** is where task bars, milestones, and vertical links can be added.
 - The **Sidebar** contains the **Toolbox** and a user-defined list of Shortcut buttons for a variety of common activities. The **Toolbox** provides the tools you need to build your schedule- including symbols, horizontal bars, and vertical links.
 - The **Legend** contains user-entered definitions for bars and symbols.
 - The **Status Bar** provides useful feedback to you while you work with your schedule.
- Enter text such as project activities, notes, and resource names in a **Text Column**.

Sidebar

The optional sidebar is an extra toolbar anchored to the left or right side of the Milestones window. The sidebar contains the toolbox and a user-defined list of shortcut buttons for a variety of activities including moving from page to page, creating web pages, filtering, applying a color theme, creating a master schedule, and much more.

Sidebar options

Under the **Tools** menu in the **Customize** section, choose **Sidebar Options** to make changes to the sidebar. Changes to the **Sidebar Options** dialog box apply to all schedules.

Choose **Show Sidebar on left**, **Show Sidebar on right**, or **Do not show Sidebar** (in which case the toolbox becomes free-floating). *You must close and restart Milestones for these changes to take effect.*

Choose to **Remove** shortcut buttons from the list of **Current Sidebar icons**, and **Add** buttons from the list of **Available Sidebar icons**.

If you cannot see all of the sidebar shortcut icons you selected, note that the number of visible sidebar icons is determined by the toolbox size, screen resolution, and Milestones window size. The fewer rows of symbols, bars, and links in the toolbox, the more sidebar shortcut icons are visible. A screen resolution of 1280x1024 will show more sidebar shortcut icons than a screen resolution of 800x600. Also, a maximized Milestones window will display more sidebar shortcut icons than a minimized window.



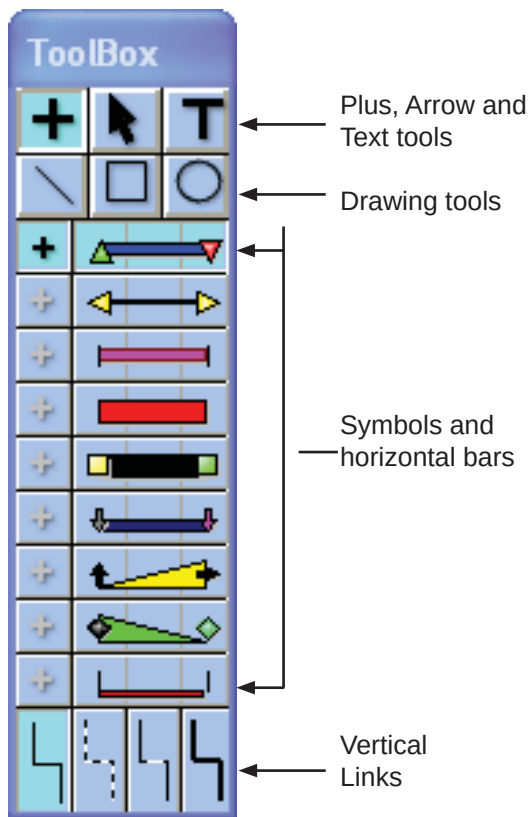
Toolboxes

Milestones Simplicity offers two types of customizable toolboxes. Both types contain the same schedule building-blocks for creating gantt bars, milestones, and task dependencies. Toolbox settings are unique to each schedule.

To choose where the toolbox is displayed within the schedule, right-click the toolbox and choose **Sidebar Options**. Choose to show the sidebar on the left or right side of the schedule; otherwise, the toolbox will be free-floating.

Combo Toolbox

With the Combo Toolbox, it's easy to add task bars in one step—simply click a small plus, then click-and-drag in the schedule area to add a symbol, horizontal bar, and symbol in one continuous mouse action.

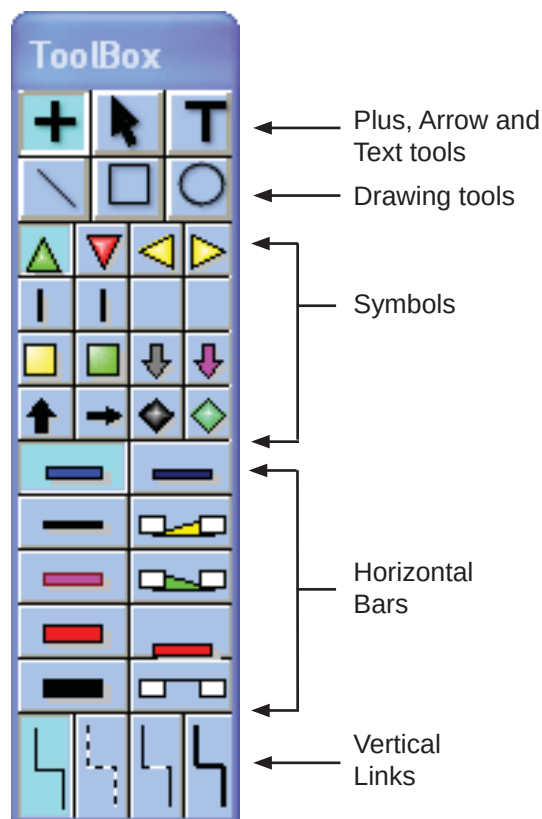


About the Combo Toolbox:

- Double-click a symbol or bar in the toolbox to change its shape, color, and other properties.
- Each of your schedules can have a different toolbox, customized with different symbols and bars.
- A Combo Toolbox can have up to 16 rows of symbol/bar/symbol combinations (32 symbols and 16 bars), and 8 vertical links.
- Right-click the toolbox and choose **Toolbox Properties** to change its size.
- You can set-up a default toolbox that will appear every time you create a new schedule. Do this by saving a "template" called Default.mtp.
- Hide the toolbox by removing the check from the **View | Optional Items | Toolbox** option. You can also right-click the toolbox and choose **Hide Toolbox**. *The toolbox will only hide if it is free-floating.*

Standard Toolbox

The Standard Toolbox makes it easy to add symbols and bars in separate steps.



About the Standard Toolbox:

- Double-click a symbol or bar in the toolbox to change its shape, color, and other properties.
- Each of your schedules can have a different toolbox, customized with different symbols and bars.
- A Standard Toolbox can have up to 32 symbols, 16 horizontal bars, and 8 vertical links.
- Right-click the toolbox and choose **Toolbox Properties** to change its size.
- You can set up a default toolbox that will appear every time you create a new schedule. Do this by saving a “template” called Default.mtp.
- Hide the toolbox by removing the check from the **View | Optional Items | Toolbox** option. You can also right-click the toolbox and choose **Hide Toolbox**. *The toolbox will only hide if it is free-floating.*

Toolbox “tools”

On the first two lines of the toolbox, you will find six buttons or “tools.” These are described in the following table:

Tool	Use this tool to:
Plus Tool 	Add symbols; connect symbols; add horizontal bars and vertical links.
Arrow Tool 	Change the date of a symbol; move graphics and freeform text; select an object.
Text Tool 	Add or edit text.
Line Tool 	Draw lines and arrows on your chart. (Not recommended for drawing links or dependencies between symbols.)
Box Tool 	Draw squares and rectangles on your chart.
Circle Tool 	Draw circles and ellipses on your chart.

Add Symbols and Bars using the Toolboxes

Horizontal bars show the time span of a task for an activity in your project. A symbol must be on each end of the horizontal bar. Symbols can also be added individually, independent of a bar.

Which toolbox should you use?

Using the Combo Toolbox, you can add a task bar with start and end symbols in one click-drag-and-drop movement of the mouse.

Using the Standard Toolbox, you must first add a symbol, and then add the bar and another symbol to the end of the bar.

Both toolboxes allow you to add single symbols, a symbol and bar to an existing symbol, or a bar between two existing symbols.

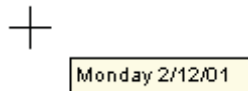
Add a task bar with start and end symbols using the Combo Toolbox

1. In the toolbox, click once on the small plus next to the symbol/bar/symbol combination you want to add. (All clicks are with the left mouse button.)

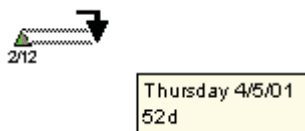


When you click in the toolbox, notice that the selection is sunken and highlighted.

2. Move the cursor to a task row in the schedule area under the date heading. Notice that the date is displayed next to the “crosshairs” cursor. This feature is part of the Milestones tooltips and can be toggled off and on in the **Tools | Program Options | Help** menu.

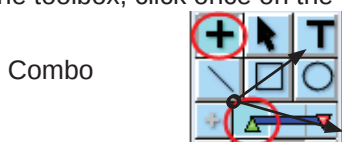


3. Next, click and hold the mouse at the start date, drag to the right, and release at the task's end date. Here, the end date is displayed next to the cursor, as well as the duration. This information can also be found at the bottom left of the Milestones window in the status bar.

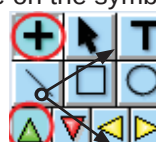


Add a single symbol using the Combo or Standard Toolbox

1. In the toolbox, click once on the big  Plus tool, then once on the symbol you want to add.



Standard



When you click in the toolbox, notice that the selection is sunken and highlighted.

2. Move the cursor to a task row in the schedule area. Notice that the cursor is a “crosshairs” cursor.



3. Next, click and hold the mouse, drag to the right or left, then release at the date you want. The date is displayed next to the cursor as you drag, looking for the correct date. By default this tooltips feature is on but can be toggled off in the **Tools | Program Options | Help** menu.



Tuesday 2/27/01

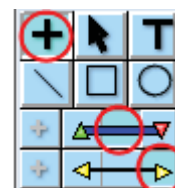
Add a bar and symbol to an existing symbol using the Combo or Standard Toolbox

Use this method when you already have a starting symbol on the schedule and want to add an ending symbol with a bar between start and end.

1. Click once on the big  Plus tool in the toolbox.
2. In the toolbox, click once on the bar that you want to add.

When you click in the toolbox, notice that the selection is sunken and highlighted.

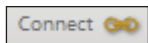
3. In the toolbox, click once on the symbol that you want to add.
4. On the schedule, position your cursor directly on top of the start symbol. Click (and hold the mouse button) on the start symbol and drag to the right. Release the mouse button on the end date.



Add a bar between two existing symbols using the Combo or Standard Toolbox

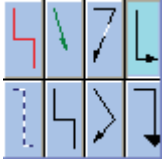
1. In the toolbox, click once on the big  Plus tool.
2. On the schedule, click once on the first (leftmost) symbol you want to connect.
3. In the toolbox, click once on the horizontal bar you want to add.
4. On the schedule, click once on the second symbol—the two symbols will then be connected.

OR...

1. In the toolbox, click once on the big  Arrow tool.
2. On the schedule, click once on the first (leftmost) symbol you want to connect.
3. Hold the SHIFT button down on your keyboard and click once on the second symbol you want to add. The two symbols should now be highlighted.
4. In the **Selection** tab, choose  Connect from the left side of the menu. The two symbols will then be connected.

Vertical Links

Vertical links are used to show a relationship or predecessor/successor link between schedule activities. The toolbox provides up to eight vertical links for use on the schedule.



Change the shape, line pattern, color, and other properties by double-clicking on a vertical link in the toolbox. Choose from more than 15 link shapes.

Up to five vertical links can originate from a single symbol on the schedule.

Add a vertical link using the Combo or Standard Toolbox

1. In the toolbox, click once on the big  Plus tool. *All clicks are single, left mouse clicks.*
2. On the schedule, click once on the symbol where the vertical link will originate.
3. In the toolbox, click once on the vertical link you want to add.
4. On the schedule, click once on the symbol (on a different task row) where the vertical link will end. The two symbols will then be connected.

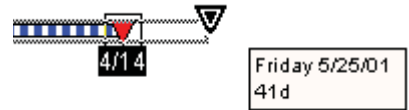
For more on vertical links and task dependencies, see Chapter 5.

Move an Existing Symbol on your Schedule

Once a symbol is placed on the schedule, several methods are available for moving the symbol to a different date.

Change a symbol's date using the mouse

1. In the toolbox, select the arrow  tool.
2. On the schedule, click on the symbol and drag it to a new date. Release the mouse button.

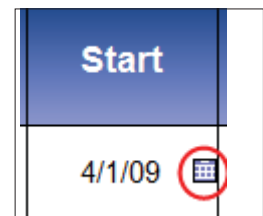


Add a symbol or change the symbol's date with a date SmartColumn

If your schedule has a date SmartColumn, manually type a date or use the date selection calendar to enter a new date or change an existing date in the column cell.

A new date (where none existed before) results in a symbol appearing on the schedule. Changing a date moves the existing start or end symbol. When using this method, dependent symbols will not move.

Insert a date SmartColumn by selecting **Insert | Rows, Columns | New Column** and choose from **Start Date**, or **End Date**.



Display calendar icons in date SmartColumns by clicking any column heading. This will display the **Selection** menu. Choose **Current Object | Switch to Column**. Then choose **Date SmartColumn Display Settings | ** **Show calendar icons**.

Other methods to change a symbol's date

1. Select the  tool from the toolbox.
2. Click on the symbol in the schedule that you wish to change. This will display the **Selection** menu.
3. Choose **Selection | Current Object: Symbol | **. Select the calendar icon to change the date.

-or-

1. Click .
2. Single-click on the symbol.
3. Hold the **Shift** key while using the left and right arrow keys on the keyboard.

-or-

1. Click .
2. Single-click on the symbol.
3. Choose **Ctrl+E** on the keyboard.
4. Key a new date in the dialog box that appears.

Delete Symbols, Bars, and Links from your Schedule

Delete a symbol

1. In the toolbox, select the arrow  tool.
2. On the schedule, click on the symbol and press the Delete key on your keyboard.

Delete a horizontal bar

1. In the toolbox, select the arrow  tool.
2. On the schedule, right-click on the symbol from which the horizontal bar starts.
3. Choose **Clear Horizontal Bars**.

Delete a vertical link

1. In the toolbox, select the arrow  tool.
2. On the schedule, right-click on the symbol from which the vertical link starts.
3. Choose **Clear Vertical Links**.

Add Text to your Schedule

Include text in these areas of your Milestones schedule: column text, symbol text, symbol notes, and freeform text.

Add text to a column

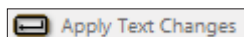
Create a column to display text by choosing **Insert | Rows, Columns | New Column | Text**.

1. Select the  Text tool in the toolbox.
2. Click once in a column cell.
3. Once you see the flashing cursor, you can begin typing. Use the arrow keys on the keyboard to move from column cell to cell.

Add text to a symbol

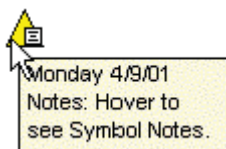
Symbol text is displayed adjacent to a symbol and moves with the symbol.

1. Select the  tool in the toolbox. On the schedule, click once on the symbol that will contain the symbol text.
2. Select the **Text** tab in the toolbar and enter up to three lines of symbol text. Press the **Apply Text Changes** button.



Add a note to a symbol

Enter up to 10,000 characters in the symbol notes field. This text is embedded in the symbol, and appears when the cursor hovers over the symbol. Optionally, print symbol notes with the schedule. Choose **File | Printing | Printing Options | ☒ Include Symbol Notes Page**.



1. Select the  tool in the toolbox. On the schedule, click once on the symbol that will contain the notes.
2. Select the **Notes** tab in the toolbar and enter the text. Press the **Apply Text Changes** button. For longer text in the notes field, make sure **Expanded Symbol Hover information display** is checked under **Tools | Program Options | Help**.

Add freeform text

Freeform text is text that is not associated with symbols, task rows, columns, or any other specific area of the schedule. Therefore, it does not move when those areas move.

1. Select the  Text tool in the toolbox.
2. Click once somewhere inside or outside of the schedule, but not on an object. Once you see the flashing cursor, you can begin typing.

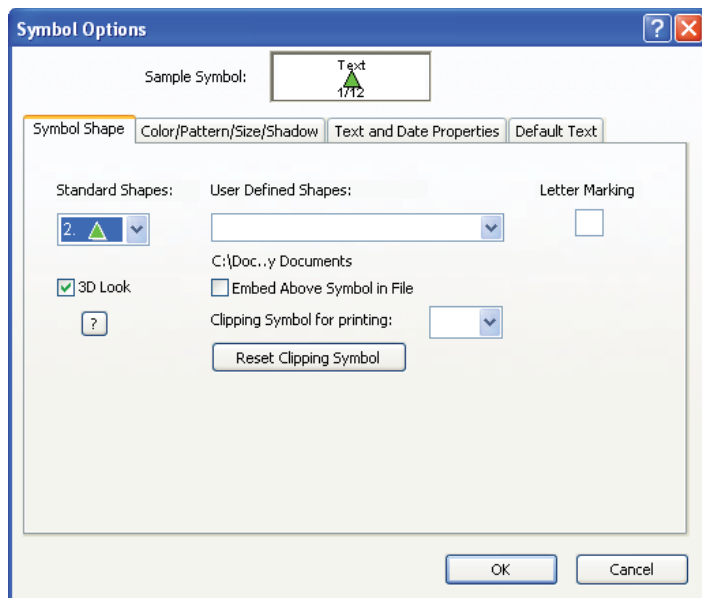
Customize a Symbol in the Toolbox

Any symbol in the toolbox can be changed to another shape, color, or size. A variety of other attributes can also be applied. Double-click a symbol in the toolbox to make changes.

When a symbol in the toolbox is changed, all occurrences of that symbol on the schedule also change. Most overrides for symbols on the schedule will revert to these new changes, unless you choose otherwise.

See Chapter 3 for more details about symbol formatting.

Choose from these symbol formatting options:



- Shape, letter marking on symbol, user-defined symbol
- 3D Look" for highlights and shadows
- Fill color/pattern, outline color/pattern, symbol mark/color
- Override size
- Shadow
- Symbol text and date position and background
- Symbol position: upper, middle, or lower part of the task row
- Default symbol text

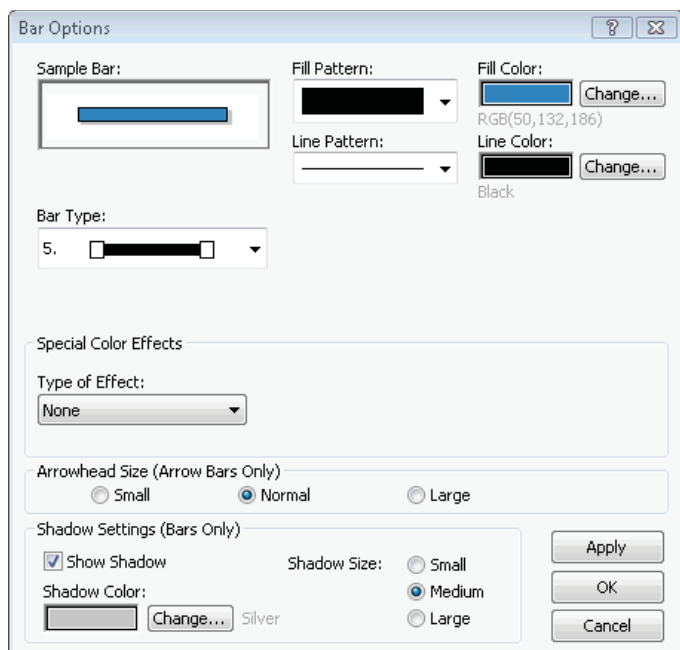
Customize a Horizontal Bar in the Toolbox

Any horizontal bar in the toolbox can be changed to another shape, color, and pattern. A variety of other attributes can also be applied. Double-click a horizontal bar in the toolbox to make changes.

When a bar in the toolbox is changed, all occurrences of that bar on the schedule also change.

See Chapter 3 for more details about horizontal bar formatting.

Choose from these bar formatting options:



- Bar type
- Fill pattern and color
- Line pattern and color
- Fading from a fill color to white
- Arrow size, where applicable
- Shadow

Customize a Vertical Link in the Toolbox

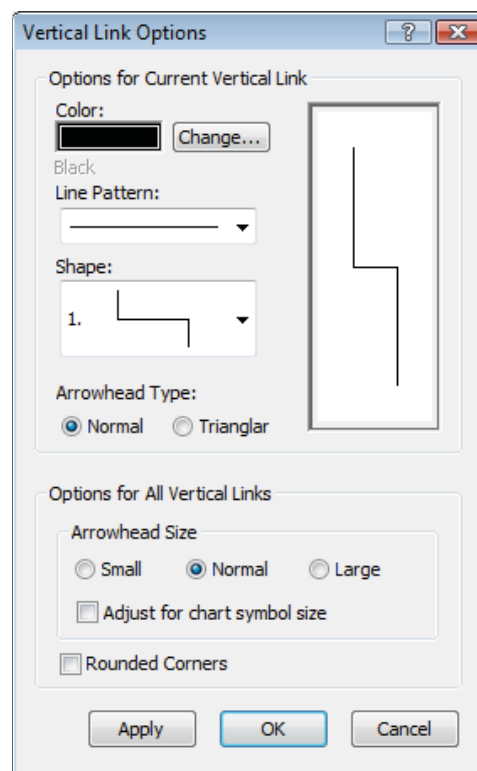
Any vertical link in the toolbox can be changed to another shape, color, or line pattern. A variety of other attributes can also be applied. Double-click a vertical link in the toolbox to make changes.

When a link in the toolbox is changed, all occurrences of that link on the schedule also change.

See Chapter 3 for more details about vertical link formatting.

Choose from these link formatting options:

- Shape
- Color
- Line pattern
- Arrow size, where applicable
- Set size relative to symbol size
- Rounded corners



Columns, Column Headings and Task Rows

Display as many as ten columns on the left side of the schedule and ten columns on the right side of the schedule. Columns can easily be inserted, deleted, moved or resized.

The column heading contains many formatting controls, including the column and column heading formats, and SmartColumn settings.

See Chapters 6 for complete coverage of formatting columns and rows.

Display 2 to 300 task rows per schedule page. Row heights can be adjusted individually. This option can be toggled on or off in **Tools | Program Options | Edit | ☒ Allow Task Row Height Adjustments**.

The diagram shows a Gantt chart grid. The columns are labeled as follows:

- Task**: The first column, with a vertical double-headed arrow and the label "Column Heading" pointing to it.
- Start**: The second column.
- End**: The third column.
- 2005**: A header for a group of 12 columns, each representing a month from Jan to Dec. A horizontal double-headed arrow labeled "Task Row" spans these columns.
- % Comp.**: The final column, representing the percentage of completion.

Enter text in a task row's column cell

1. Select the **T** tool in the toolbox.
2. Click within one of the cells in the column area and begin typing.

Task	Start	End	Jan
Typing in a cell			

Move between column cells

Press the arrow keys $\leftarrow$ $\rightarrow$ $\downarrow$ $\uparrow$ on your keyboard to move between columns and cells.

Add or edit a column or SmartColumn

Schedule columns are used to display text or specialized information (SmartColumn).

A Text column displays user-entered text, such as project activities, notes, resource names, and more.

To add a column, choose **Insert | Rows, Columns | New Column** and choose from the following SmartColumns: Start Date, End Date, Outline Level, and Task Number.

- To change an existing column to another column type, double-click the column heading, choose the Column Type (SmartColumn) Settings tab and change the SmartColumn Definition.
- To edit an existing SmartColumn's properties, double-click the column heading, and choose the Column Type (SmartColumn) Settings tab.

- To change an existing column to another column type, click the column heading once, choose **Switch to Column** from **Current Object: Column Heading** section, then use the drop-down menu in the **Column Type and Format** section to change the SmartColumn Definition.

To edit an existing SmartColumn's properties, click the column heading once, choose **Switch to Column**, then click **Column Type and Format | Properties**.

- » If the column is a Date SmartColumn, additional properties can be found in the **Date SmartColumn Display Settings** section of the same menu. Choose to **Show Time as 24 Hours; Hide Year; Hide Month, Day, and Year; Hide Time; Show calendar icons**; or **Use Custom Date Format**.

Change the column heading properties

Click once on the column heading section (the upper cell of the column). This will display the **Selection** menu in the toolbar.

1. Under the **Column Heading Text** section, enter up to 2 lines for the column name. Click **Apply Text Changes**.
2. **Apply Changes to all column headings** to format all column headings like this one.
3. Set the column heading text alignment and text highlights in the **Column Heading Text Display Settings** section.
4. Choose a **Background Color**.
5. Choose a **Special Effects** setting to fade from the column heading color to white.
6. Select a font size for the column heading text.

Change the column properties

Column properties options control the column's background color, text font size, currency display, decimals, outlining indentation amount and more.

1. Click once on the column heading. This will display the **Selection** menu.
2. Choose **Current Object: Column Heading | Switch to Column**.
- In the **Column Type and Format** section -
3. Choose column **Text Style**, **Text Size**, and **Alignment**.
4. For outlining purposes, enter a value in inches to **Indent per Outline Level** for the column text.
- In the **Column Background** section -
5. Change the **Background Color** for the column.
6. Choose **Background Color Special Effects** for the fade setting (fades from *Background Color* to white).

Bookmark Task Rows

Add a bookmark name to any task row and then jump to that task row by choosing the bookmark name from a list of bookmarks. Especially helpful in large schedules, this feature allows the user to quickly jump to specific schedule areas.

Bookmark a task row

1. In the toolbox, click the arrow tool .
2. Right-click once on the task row to be bookmarked.
3. Choose  **Bookmarks** in the right-click menu.
4. Select  **Create a new Bookmark**.
5. **Key a Name:** The text in the text column closest to the schedule area on the left will display as the default bookmark text. The bookmark name is limited to 29 characters.
6. Click **Create a Bookmark Now** to bookmark the task row.

Display Bookmark icons

☒ **Show Bookmark indicator on task row display** to show the  icon. The icon will be displayed in the column directly to the left of the schedule area on the bookmarked task row.

Jump to a bookmarked task row

1. Right-click any task row and choose  **Bookmarks**.
2. Select  **Jump to a Bookmark or Delete a Bookmark**.
3. Under **Select Bookmark**, choose from the list of bookmark names.
4. Click **Jump to a Bookmark Now**.

Delete one or more bookmarks

1. Right-click any task row and choose  **Bookmarks**.
2. Select  **Jump to a Bookmark or Delete a Bookmark**.
3. Under **Select Bookmark**, choose a bookmark name to be deleted.
4. Choose **Delete Selected Bookmark Now** or **Delete all Bookmarks Now**
5. Choose **OK / Leave** to exit the dialog box.

The **Current Task line** number or **Task line of Bookmark** number indicates the row location of the selected task. Numbering is 1-based, begins with the top-most task row, and includes any hidden tasks.

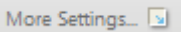
Set the Project Start and End Dates

The project start and end dates control the visible date range that appears in the Milestones window.

1. Choose **Dates | Start and End Dates** from the toolbar.
2. Under **Displayed Start Date**, enter a date. Press the apply button 
 - Click the  for a date selection calendar.
3. Under **Displayed End Date**, enter a date. Press the apply button 

You can still add symbols and bars outside of this range by scrolling forward and backwards with the Shift+PgUp and Shift+PgDown keys or in **Date | Date Range Tools |**  **Shift displayed range backward** /  **Shift displayed range forward**.

Change the amount of days by which the scroll buttons move through the calendar by going to **Dates | Start and End Dates | More Settings... | Yearly/Monthly/Fiscal Year Settings | Calendar Range Scrolling | Working days to scroll with Shift+PgUp/PgDn**.

By clicking on **Dates | Start and End Dates | More Settings** , you'll find other Schedule Details options, including a place to change fiscal year formatting, shade weekends, and allow hourly detail.

Current Date, Current Date Line, and Status Line

Display the current date and current date line

The current ☒ date, as set by your computer's clock or an override date, can be displayed above the upper right corner of ☐ the schedule (by default). The current date line is drawn vertically down the schedule area at the appropriate ☒ date heading location.

1. Choose **Dates | Current Date** from the toolbar.
2. **Display Date** to show the current date.
3. **Display Date Line** to show the date line.
4. To access other Date Line properties, choose **More Current Date Options** . In the **Date Line** section, choose the line type, thickness, and color. Place the line behind the horizontal bars in the schedule area.

Display and format the status line

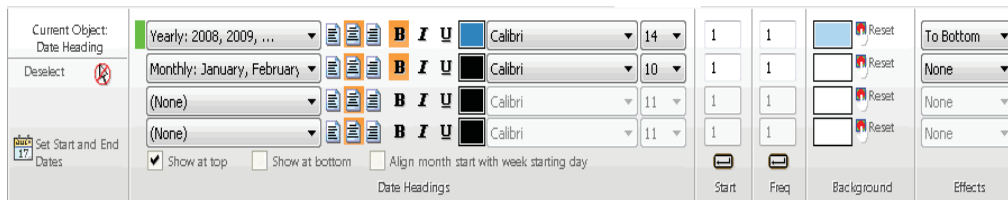
Show at-a-glance ahead/behind status with the status line. The status line extends vertically along the current date line and bulges to the left or right according to each task row's status date.

1. Choose **Dates | Current Date**.
2. ☒ **Display Status Line**.
3. To access other Status Line properties, choose **More Current Date Options** . In the **Status Line** section, choose the line thickness and color.
4. To make sure the status line displays bulges correctly, make sure the options **Symbols: Fill to Status Date** or **Bars: Fill to Status Date** are checked under **Dates | Date Related Settings**.

The Date Headings

Display up to four date heading levels with formats ranging from minutes to years to custom entries.

1. To change the date heading display, click once on the date heading within the schedule. This will display the **Selection** menu. Optionally, choose **Dates** | **Date Headings** | **Date Headings Full Dialog** 



2. For each level, choose from more than 35 Heading Types (yearly, monthly, etc.).
3. Align each heading's text.
4. Choose a **Start** number for the heading.
 - This feature is useful to start a schedule on a specific number that does not relate directly to the dates on the schedule. For example, if your schedule starts in January, you can use a start number of 5 to show that January is the 5th month since the start of the contract.
5. Choose a **Frequency** for the heading.

2005					
Jan	Feb	Mar	Apr	May	Jun
5	6	7	8	9	10

 - For example, in a yearly heading of a project whose start date is 1/1/2008, with a frequency of 2, the yearly heading would be 2008, 2010, 2012, etc.
6. Choose to display the date headings at the top and/or bottom of the schedule.

See Chapter 6 for more information on date headings, including custom headings.

Add Graphics to the Schedule

You can paste graphics anywhere on your schedule.

1. Copy the image (e.g. by right-clicking on an image and choosing “copy”).
2. In Milestones, choose **Edit** | **Paste** | **Picture**.
3. The Paste Picture cursor appears: .
4. Move the cursor to the appropriate location, and then click to paste the image.

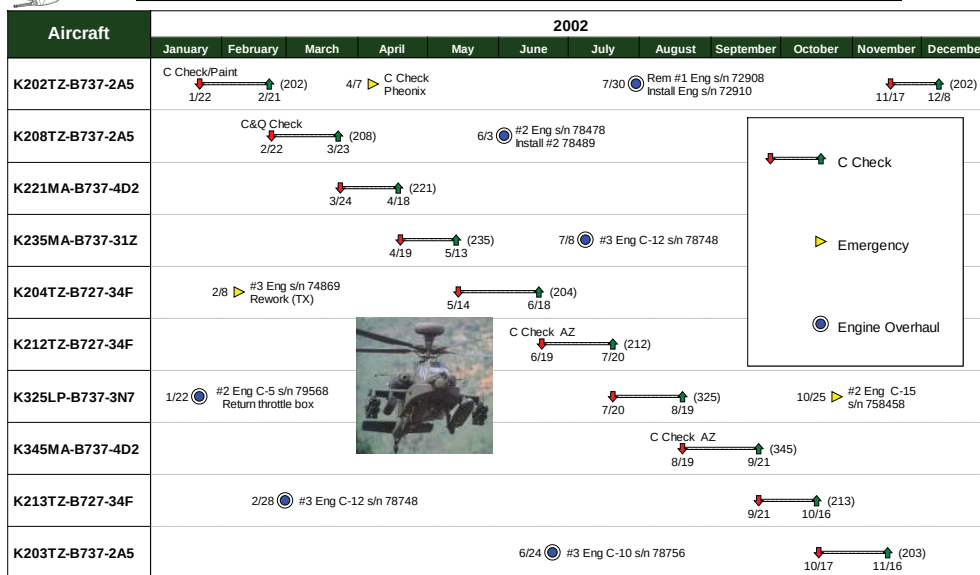
-or-

1. Choose **Insert** | **Picture, Legend** | **Picture from file**.
2. Browse to the graphics file, select it, and choose **Open**.
3. The Paste Picture cursor appears: .
4. Move the cursor to the appropriate location, and then click to paste the image.

To resize the graphic, click once on it, hold down the **Shift** key, click-and-hold on a corner of the graphic, and drag to make it larger or smaller. (The Shift key keeps it in proportion.)



World-Wide Airways Corp Maintenance Planning Forecast



Keyboard Shortcuts

Keyboard shortcuts are useful when editing a schedule. The following is an abbreviated list of function and key combination shortcuts. For complete shortcut documentation, consult the **Help Topics** available under **Help | Help Files | Help Topics**. Index keyword: "shortcuts."

Pressing this key...	Causes this action...
Escape key	Halts current activity when possible.
Tab (or Shift + Tab)	Indents (or outdents) one outline level if the Use Tab key for Outlining option is selected – See Tools Program Options Edit menu.
F1	Starts Help. If in dialog box, displays context help for selected control.
F8	Continuous View (toggle).
F9	Redraws the current schedule.
F11	Switches between Fit in Window view and current Zoom setting.
F12	Toggles through the first six tools in the toolbox.
Alt+F12	Select horizontal bar in toolbox
Alt+Shift+Right Arrow	Indents (promotes) a task by one outline level.
Alt+Shift+Left Arrow	Outdents (demotes) a task by one outline level.
Ctrl+F12	Select next vertical link in toolbox
Ctrl+Spacebar	Select next column

Pressing this key...	Causes this action...
Ctrl+W	Change vertical link coming from selected symbol to type currently selected in toolbox
Alt+Spacebar	Select next task row
Ctrl+Alt+Spacebar	Select next column heading
Ctrl+Shift+Spacebar	Select next Date heading
Alt+Shift+F7	Displays a screen which enables you to selectively reset symbol settings for all symbols.
Ctrl+Alt+*(on number pad)	Show all task rows.
Shift+F10	Display right-click menu for selected item
Shift F12	Select next symbol in toolbox. If an entire row in the Combo toolbox is highlighted, then Shift+F12 highlights the next row.
Shift+Right Arrow	When a symbol is selected, changes date forward by one minute, hour, day or week (depending upon the setting in Tools Program Options Dates menu.)
Shift+Left Arrow	When a symbol is selected, changes date back by one minute, hour, day or week (depending upon the setting in Tools Program Options Dates menu.)
Page Down	Moves to the next page on your schedule
Page Up	Moves to the previous page
Ctrl+Home	Moves to the first page
Ctrl+E	Edits currently selected item
Ctrl+F	View Full-screen toggle
Ctrl+End	Moves to the last page
Ctrl+L	Select next left cell (if a task row or cell is currently selected). Selection will only move on one side of the schedule.
Ctrl+M	Change selected symbol to type currently selected in toolbox
Ctrl+N	Start new schedule
Ctrl+O	Open file
Ctrl+R	Select next right cell (if a task row or cell is currently selected). Selection will only move on one side of the schedule.
Ctrl+U	Change selected horizontal bar to type currently selected in toolbox
Ctrl+Alt+G	Switch to Calendar View
Ctrl+Alt+S	Start Symbol Maker Program
Ctrl+Z	Undo

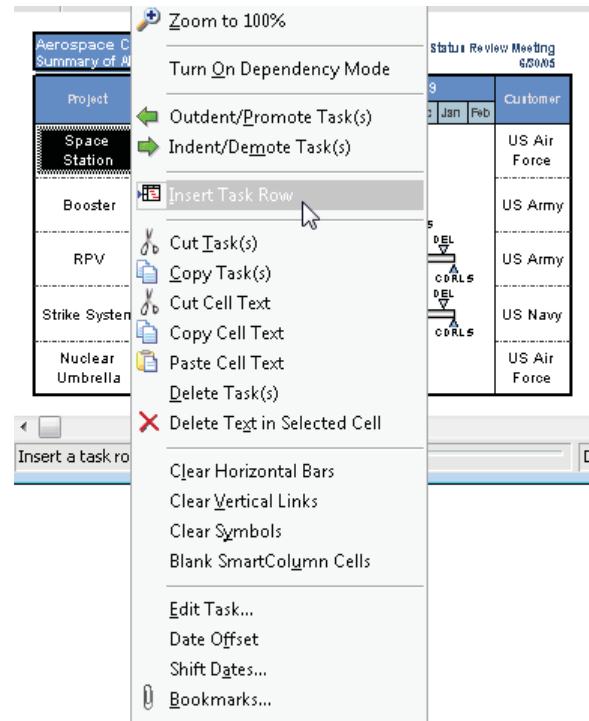
Right-Click “Context Sensitive” Menus

A right-click on any part of the schedule will display a shortcut menu with a list of options.

Right-click a column heading to hide it, show all column, access column properties and more.

Right-click the toolbox to change its properties, access the sidebar options, and more.

Below are the detailed options for two right-click areas:



Right-click on a task row's column cell to access these functions:

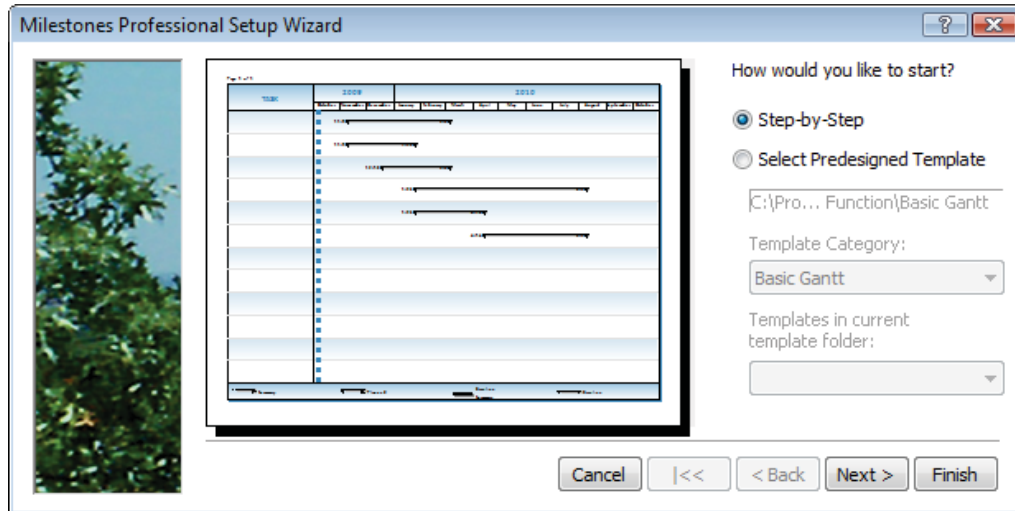
- Zoom
- Turn Dependency Mode On/Off
- Outdent/Promote Task
- Indent/Demote Task
- Insert task row
- Cut task(s)/Copy task(s)
- Cut/Copy/Paste Cell Text
- Delete Task(s)
- Delete Text in Selected Cell
- Clear Horizontal Bars/Vertical Links/Symbols
- Blank SmartColumn Cells
- Edit Tasks
- Date Offset
- Shift Dates
- Bookmarks
- Gridline/Shade
- Font
- Insert page break

Right-click a symbol on the schedule to access these functions:

- Zoom
- Turn Dependency Mode On/Off
- Copy Symbol/Bar for Paste
- Delete
- Clear Horizontal Bars
- Font
- Select Task
- Schedule Recurring Task
- Edit Tasks
- Edit Notes
- Edit Size or Color
- Edit Text or Date Position
- Select symbol and bar in toolbox
- Highlight/Dehighlight Dependent Symbols

Schedule Setup Wizard

To launch the **Milestones Simplicity Setup Wizard**, choose **File | Files and Templates: Open and Save Options | Wizard**. This wizard will walk you through the setup of your schedule step-by-step or guide you through using a pre-designed template. Follow the Wizard's prompts to successfully complete the desired layout for your new schedule.



Choose the  **Select Predesigned Template** option to select from a wide variety of templates that are pre-formatted.

Save a Schedule

Save Milestones schedules under the same name, a new name, or in the previous version's format. Choose **File | Files and Templates: Open and Save Options | Save** or **Save As | Chart**.

For faster saving or opening across a network, choose **Tools | Program Options | Files and Automation** and check **Two Stage File Saves...** and **Two Stage File Reads...**

Viewing Options

Gantt views

A Milestones Simplicity schedule can be toggled between two Gantt chart view modes. To switch from one Gantt view to another choose **View | Viewing Options | Chart Type**.

Gantt - Calendar View

You can show any schedule in Calendar View. Choose **View | Viewing Options | Chart Type | Gantt - Calendar View**.

Milestones and symbol text in the schedule area are displayed in **Calendar View**.

If a single task row has been selected prior to entering Calendar View, then the bars as well as the symbols on the row will be shown in the Calendar View.

If no rows are selected then all symbols will be shown (horizontal bars are not displayed due to space limitations). Any free-form text entered in Gantt view will not be shown. Any text entered in Calendar View will be shown just in Calendar View.

If two or more task rows are selected, only symbols from those task rows will be displayed in Calendar View. If some task rows are hidden, then only visible task rows' symbols will be displayed. Use the PageUp and PageDown keys to scroll from month to month.

Administrative Division January 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2 Resource review ▲	3
4	5 Staff meeting ▼	6	7	8	9 Dept meeting ▲	10
11	12 Staff meeting ▼	13	14	15 Design Review ▶	16	17
18	19 Design Review ▶	20	21 Staff meeting ▼	22 Design Review ▶	23	24
25	26 Monthly report ▲	27	28	29 Dept meeting ▲	30	31
1	2	3	4	5	6	7

Views by Time Period

Instantly switch the time period displayed in the date headings to a daily, weekly, monthly, quarterly, or yearly view.

For example, expand the viewable schedule area to a large time-frame (*Yearly View*) or contract to a small-time-frame (*Daily View*).

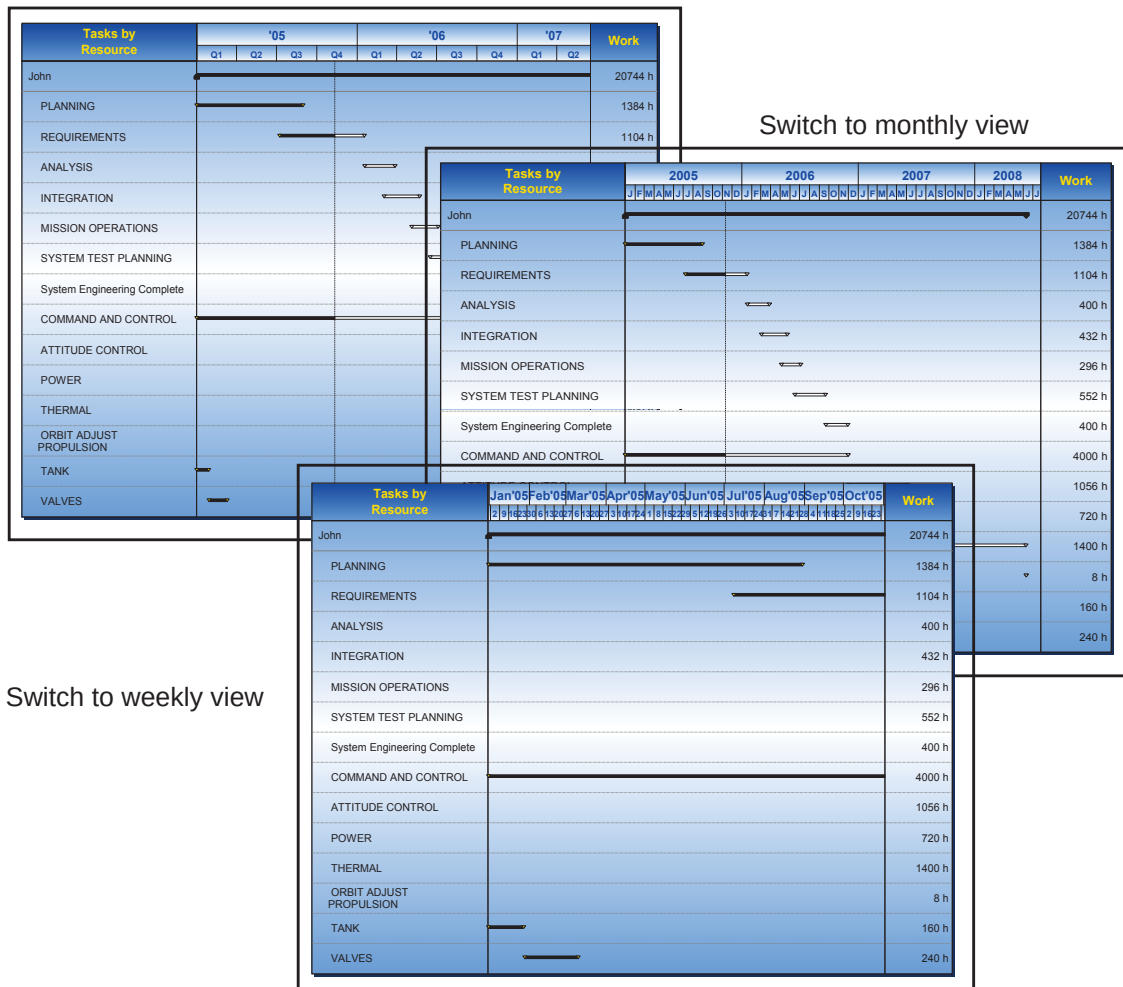
Simply right-click the date heading and select a view, including your original view.

The schedule's start date remains the same when switching between views, while the number of days, weeks, months, quarters or years displayed is based on font size and the amount of horizontal space available to display the selected time periods.

If the schedule is saved and closed before choosing Switch back to Original View, then the Original View time period cannot be recovered.

Switch to Daily View
Switch to Weekly View
Switch to Monthly View
Switch to Quarterly View
Switch to Yearly View

Original View



Chapter 3: Customizing the Toolbox and Sidebar

The toolbox contains the building blocks of your schedule: symbols, horizontal bars, and vertical links. Any of these symbols and bars can be changed to a different shape, size, type, color, or pattern.

All of the toolbox settings are unique to the current schedule. Thus, if you make a toolbox change in one schedule, it does not affect any of your other schedules.

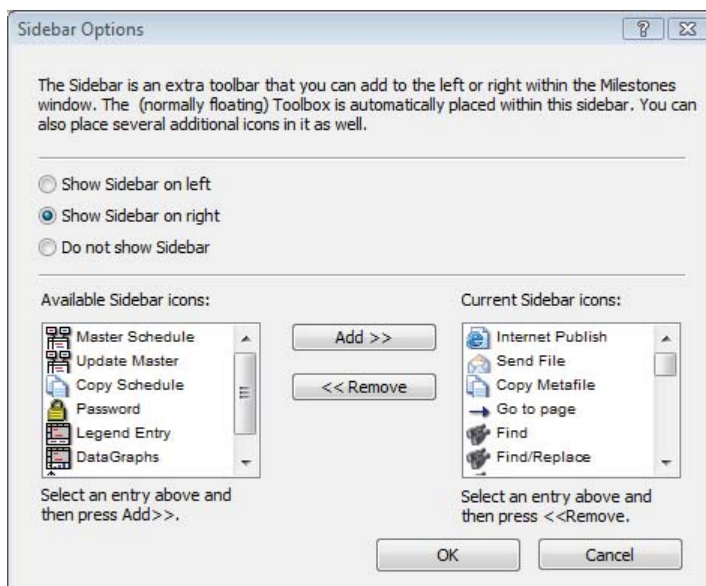
- » You can copy and paste the toolbox into other schedules or save the file as a personal template so that all toolbox settings are retained for future use. To copy the toolbox, right click and choose **Copy Toolbox**.

If the sidebar option is selected, the toolbox automatically appears within the sidebar.

Sidebar

The optional sidebar is an extra toolbar anchored to the left or right side of the Milestones window. The sidebar contains the toolbox and a user-defined list of shortcut buttons for a variety of activities.

Changes made in the **Sidebar Options** dialog box apply to all schedules.



Display the sidebar

1. Choose **Tools | Customize | Sidebar Options**.
2. Select either ☒ **Show Sidebar on left** or ☒ **Show Sidebar on right**.
3. You must close and restart Milestones for this change to take effect.

Remove the sidebar

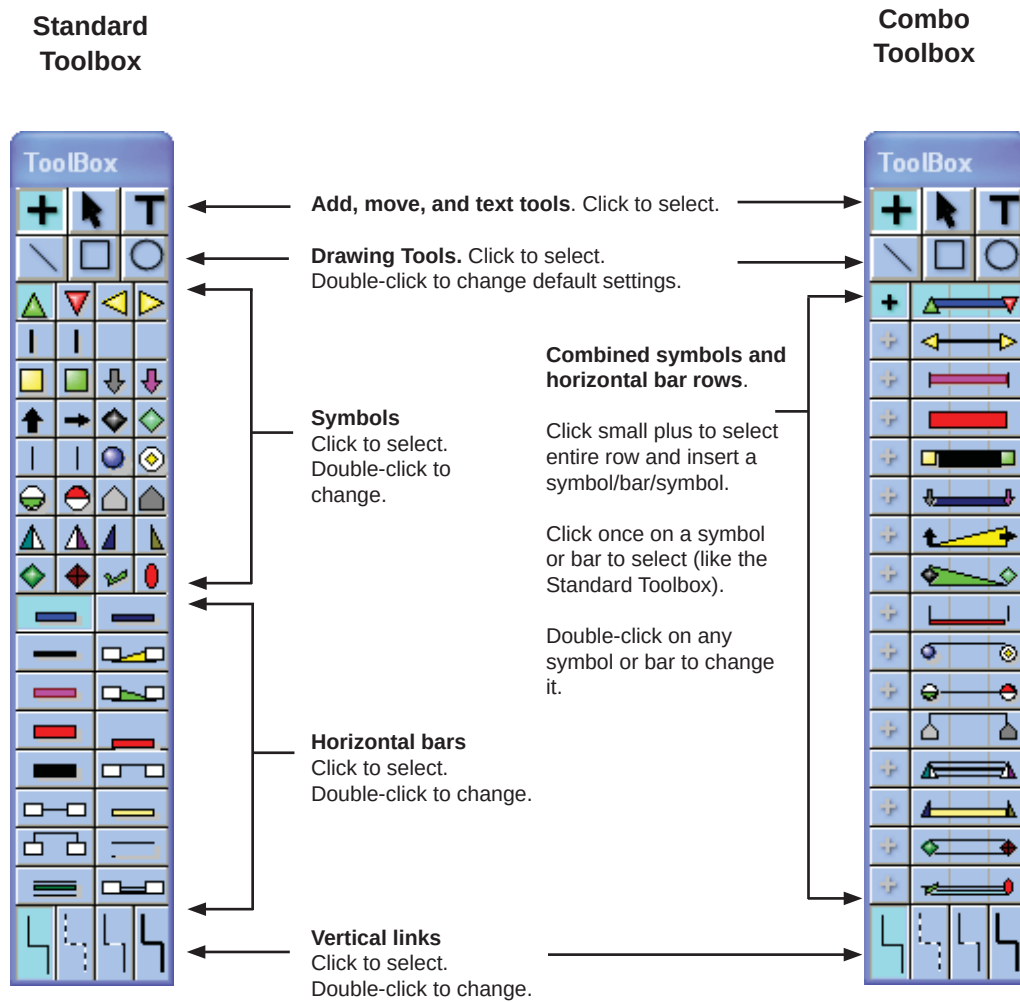
1. Choose **Tools | Customize | Sidebar Options**.
2. Select ☒ **Do not show Sidebar**. This will make the toolbox free-floating.
3. You must close and restart Milestones for these changes to take effect.

Add and remove selected sidebar icons

1. Choose **Tools | Customize | Sidebar Options**.
2. Add sidebar icons: Select from the list of **Available Sidebar icons** and then click **Add>>**.
3. Remove sidebar icons: Select from the list of **Current Sidebar icons** and then click **<<Remove**.

Combo and Standard Toolboxes

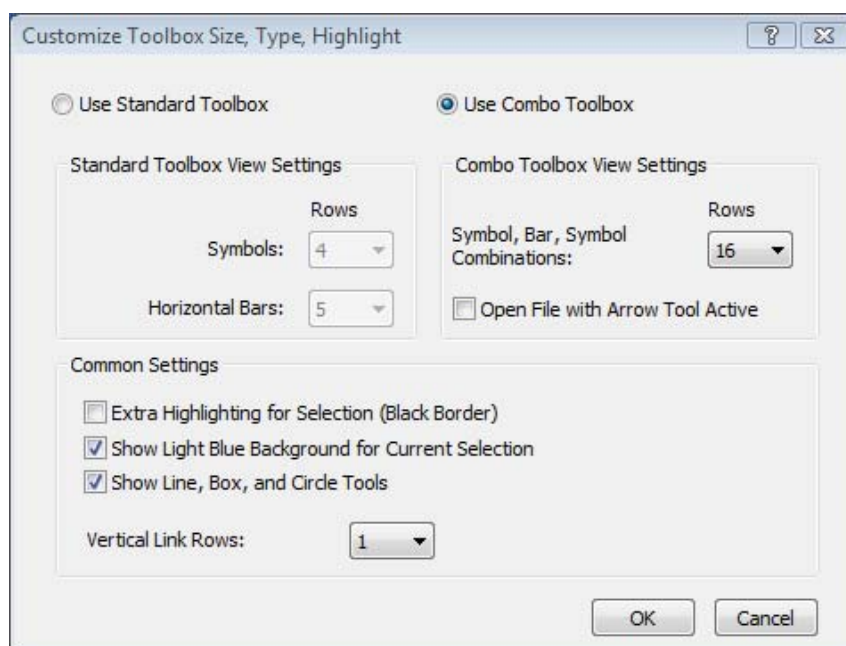
There are two versions of the toolbox. The Standard Toolbox groups the symbols and bars separately, while the Combo Toolbox combines two symbols and one horizontal bar on each row for symbol/bar/symbol combinations. The Plus tool, Arrow tool, Text tool, drawing tool, and vertical link sections are the same:



Set Toolbox Size and Type

Since the toolbox can take up a significant amount of screen space, you can customize it to remove rows of tools, symbols, and bars that you do not need for the schedule you are working on.

1. Right-click the toolbox and choose **Toolbox Properties**.



2. Choose ☒ **Use Standard Toolbox** or ☒ **Use Combo Toolbox**.
3. For the Standard Toolbox, select the number of symbols and horizontal bars that should display. For the Combo Toolbox, select the number of symbol/bar/symbol rows that should display.
4. The Combo Toolbox offers the option of activating the Arrow Tool when this schedule is opened. This prevents accidentally adding symbols and bars.
5. ☒ **Extra Highlighting** provides a black outline for selected items in the toolbox.
6. ☒ **Show Light Blue Background for Current Selection** provides a blue background for selected items in the toolbox.
7. Choose to show or hide the drawing tools.
8. Choose to display 0, 1, or 2 rows of Vertical Links.

Toolbox: Free-floating or Anchored in the Sidebar

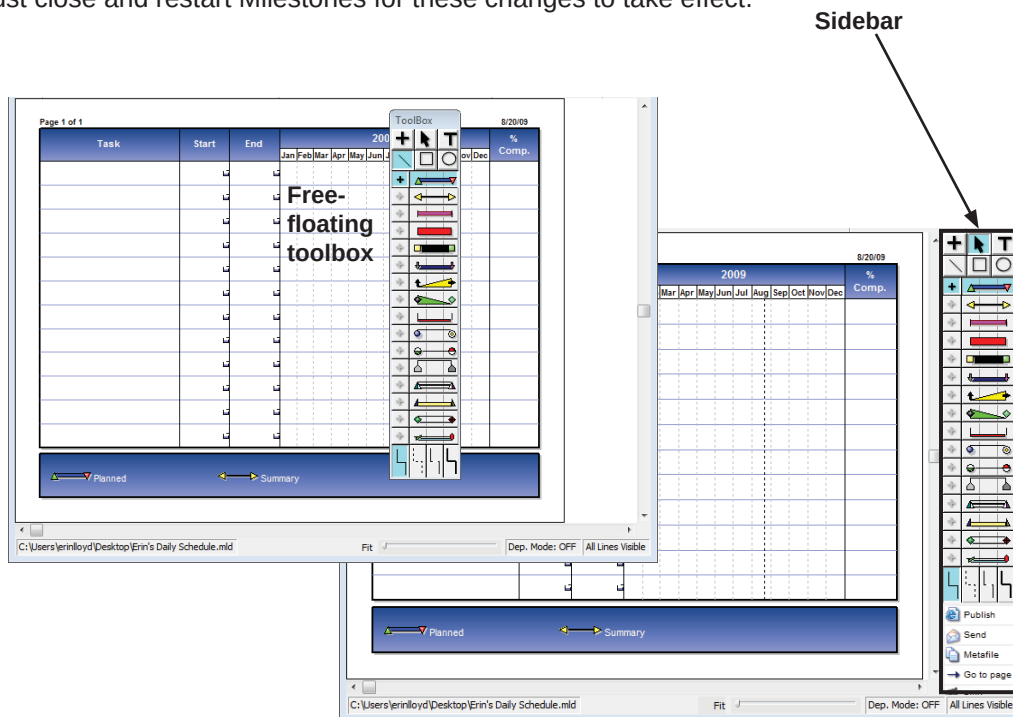
Choose to display the toolbox as free-floating or choose to display the sidebar, in which case the toolbox is automatically displayed within the sidebar. You cannot display the sidebar without the toolbox within it. You cannot display a free-floating toolbox and a sidebar.

Display a free-floating toolbox

1. Choose **Tools | Customize | Sidebar Options**.
2. Select ☒ **Do not show Sidebar**.
3. You must close and restart Milestones for these changes to take effect.

Display the toolbox within the sidebar

1. Choose **Tools | Customize | Sidebar Options**.
2. Select either ☒ **Show Sidebar on left** or ☒ **Show Sidebar on right**.
3. You must close and restart Milestones for these changes to take effect.



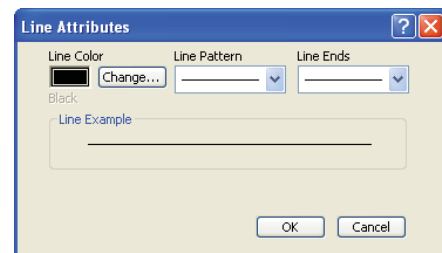
Set Drawing Tools Defaults

The default settings for lines, boxes, and circles that you add to a schedule are black for color and lightweight for line type. You can alter these default values by double-clicking on the Line, Box, or Circle tool in the toolbox.



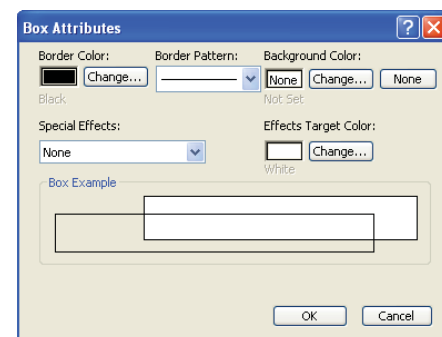
Line drawing tool

Change the Line Color, Line Pattern, and Line Ends (to create an arrow).



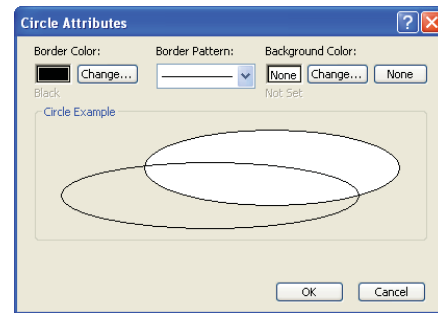
Box drawing tool

Change the Border Color, Border Pattern, Background Color, Target Color, and fading Special Effects. The Special Effects setting will fade the Background Color into the Target Color.



Circle drawing tool

Change the Border Color, Border Pattern, and Background Color.



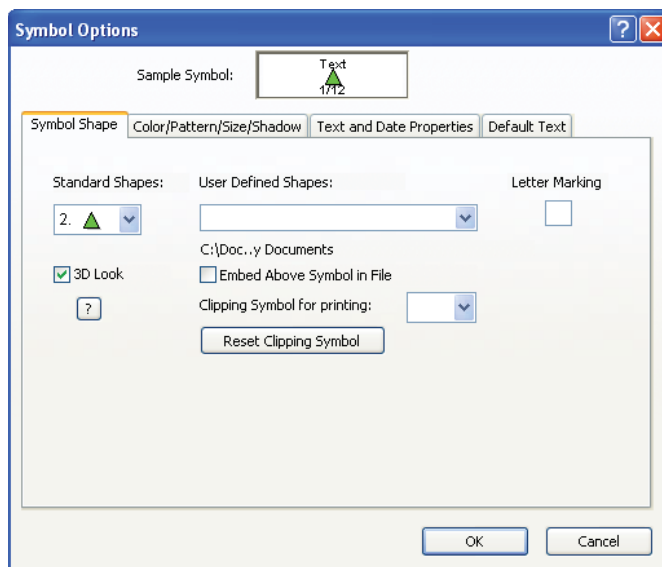
To add any of these shapes to your schedule, click once on the tool, then click-and-drag in the schedule area to draw. Once placed on a schedule, lines, boxes, and circles do not move unless dragged with the arrow tool to a different location.

You can customize the attributes of any line, box, or circle that is already on your schedule by double-clicking directly on the object. When you do, a similar dialog box appears that lets you change the setting of just that object.

Set Symbol Defaults

To change the attributes of a symbol in the toolbox, double-click on the symbol in the toolbox. Any changes to the symbol in the toolbox will affect all occurrences of that symbol on the schedule. That is, when the new changes replace the old, all occurrences of the old symbol type on the schedule are replaced by the new settings.

Choose symbol shape, type, letter mark and user-defined symbols



To set a symbol's defaults:

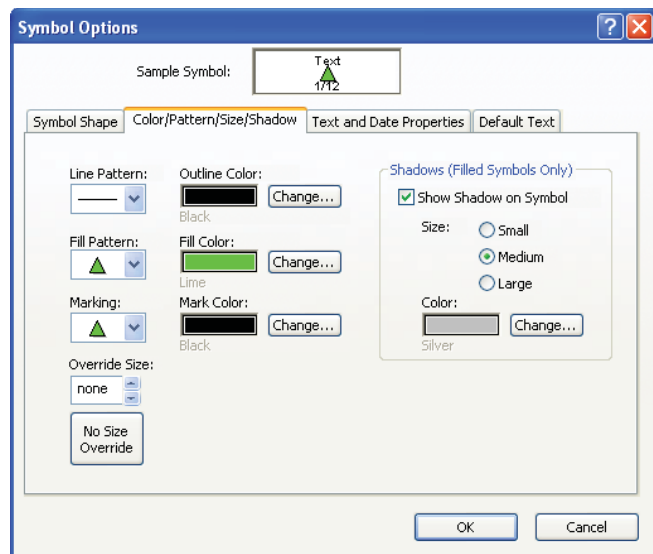
1. Double-click a symbol in the toolbox.
2. Click the **Symbol Shape** tab.
3. Click a drop-down arrow  to view the options.

The **Sample Symbol** changes to match your selections as you make them.



- Choose from 130 **Standard Shapes**.
- Apply “3D Look” attributes. 3D Look highlights a symbol with a simulated light source and adds a shadow. Not all symbols allow the 3D Look.
- **Letter Marking**: Enter one letter or number to appear with the symbol. Select Symbol Shape #28 or #33 to show just the letter marking as the symbol.
- If you have created your own symbol, and that symbol is in the Symbols folder, select it under **User-Defined Shapes**. Optionally, choose to embed it in the schedule so that the symbol is available when sending or sharing the chart.

Choose symbol color, pattern, marking, after status color, shadow



To set a symbol's defaults:

1. Double-click a symbol in the toolbox.
2. Click the **Color/Pattern/Size/Shadow** tab.
3. Click a drop-down menu  to view the options.

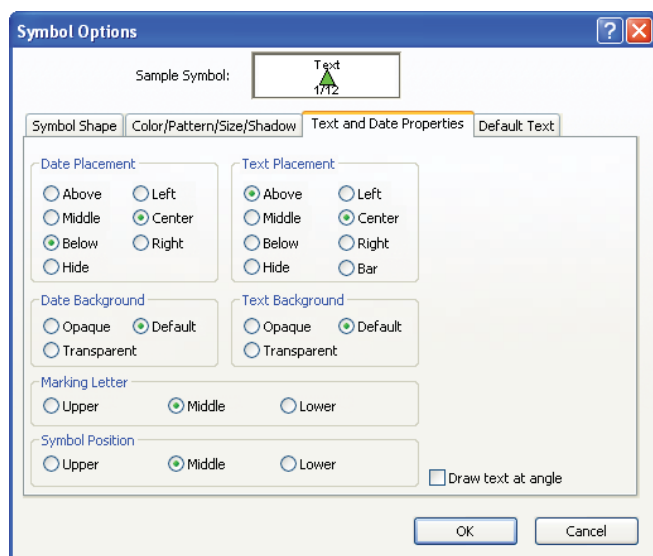
The **Sample Symbol** changes to match your selections, as you make them.



- Choose the **Line Pattern** and **Outline Color** that encompasses the symbol.
- Choose a **Fill Pattern** and **Fill Color** that fills the inside of the symbol.
- Choose a symbol **Marking** pattern and **Mark Color**, such as \ or \\ through the symbol, a box or circle enclosing the symbol, and more.
- Choose a **Shadow** color and size.
- Set an **Override Size** for this symbol only. This override will apply to all symbols of this type that already exist on the schedule (optionally) and all future symbols of this type that are placed on the schedule. Note that bars continue to be displayed at the size that is based upon the symbol size for the entire schedule.

Choose positioning for symbol text, date, marking letter, symbol

Set the position of the symbol date, symbol text, marking letter, and the symbol itself. Choose the symbol text background colors as well as the text and date background degree of transparency.



To set a symbol's defaults:

1. Double-click a symbol in the toolbox.
2. Click the **Text and Date Properties** tab.

The **Sample Symbol** changes to match your selections, as you make them.



- Set the **Date Placement** as ***Above, Middle, Below*** (vertical positioning); and ***Left, Center, Right*** (horizontal positioning). Optionally, ***Hide*** the date.
- Set the **Text Placement** as ***Above, Middle, Below*** (vertical positioning); and ***Left, Center, Right***, or ***Bar*** (horizontal positioning). Optionally, ***Hide*** the text.
- For **Date Background** and **Text Background**:
 - » ☒ **Opaque** causes a solid background to appear under the text to keep underlying lines from going through the text.
 - » ☐ **Transparent** causes the text to not obscure any underlying graphics.
 - » ☐ **Default** is usually the same as Opaque.
- For **Symbol Position**, choose ***Upper, Middle, or Lower*** as the vertical placement within a task row.
- For **Marking Letter**, choose ***Upper, Middle, or Lower*** as the vertical placement within the symbol.
- Check **Draw text at angle** to force symbol text to display at the angle set in **Tools | Program Options | Edit**. This override will apply to all symbols of this type that already exist on the schedule (optionally). To change the angle of the angled text, choose **Tools | Program Options | Edit | Angle for Angled Symbol Text**.

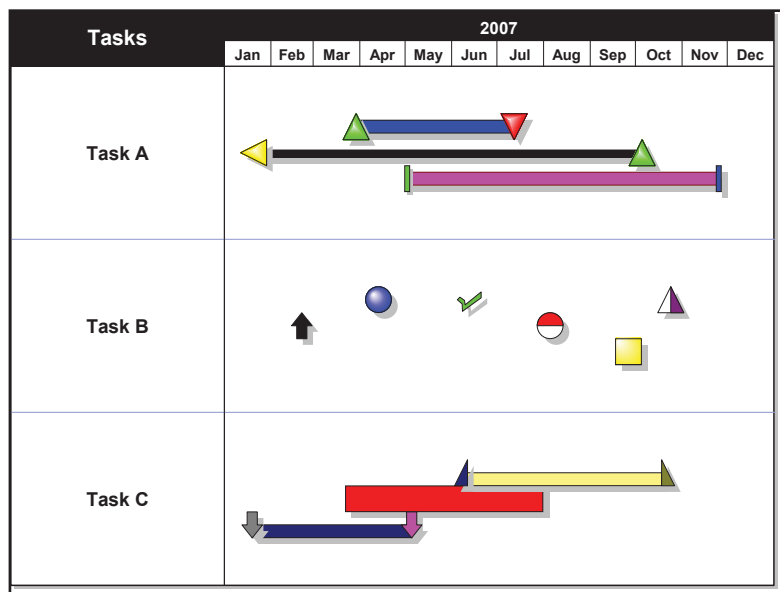
Symbol Positioning Example

This schedule has three task rows. Within each task row, the symbols are positioned vertically as upper, lower, and middle.

The bars follow the positioning of the symbols to which they are attached.

Change a symbol's position

1. Click once on the symbol on the schedule.
2. Hold the **Shift** key.
3. Press the **up arrow** key or **down arrow** key to shift the symbol position.



✍ If you change the settings for a symbol in the toolbox and that symbol already exists on the schedule, all the affected symbols are checked to see if they have individual settings that differ from the new default settings. If so, you are given the opportunity to keep the individual override settings by checking or unchecking the items you wish to override on the **Select Items to Change** dialog box.

Choose default symbol text

Assign up to three lines of text to each symbol in the toolbox. When a symbol with Default Text is added to the schedule, both the symbol and the text appear.

The text is based on user-entered text or text from a selected column.

The dialog box is titled "Symbol Options" and has four tabs: "Symbol Shape", "Color/Pattern/Size/Shadow", "Text and Date Properties", and "Default Text". The "Default Text" tab is selected. It contains a "Sample Symbol" preview showing a green triangle with the text "Text 1/12". Below the preview, there is a text area with instructions: "Key any default symbol text for this symbol. Each time this symbol is placed on the schedule, the text below will be set as the symbol text. You can change it later by double-clicking on the symbol on the schedule and replacing the text. The text you enter here will not replace the text of any of these symbol types once they have been placed on the schedule. The Clear Entries button only clears the lines below. It has no effect on symbols that have already been placed on the schedule." Below the instructions, there are three lines of text input. Each line has a text box, a dropdown menu for "Insert Text from Column below" (all set to "10: End"), and an "Insert" button. A "Clear Entries" button is at the bottom. "OK" and "Cancel" buttons are at the bottom right.

To set a symbol's defaults:

1. Double-click a symbol in the toolbox.
2. Click the **Default Text** tab.
3. Click a drop-down menu  to view column names.

Text

Project ABC
Research Phase


 Enter up to 56 characters for each default text line.

attached to any symbol already on the schedule will not be affected by changes to the *Default Text*. That is, changes to the *Default Text* only affect symbols that subsequently get added, not those already on the schedule.

- For user-entered text, under **Line**, enter the text to appear when this symbol is added to the schedule.
- For a column's text to appear as the default text, under **Insert Text from Column below**, select an existing column from the drop-down list, then press **Insert**.
- Repeat by assigning user-entered text and/or column-based text for up to three lines of symbol text.

Phase	Name	2007												2008			%
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar				
Research	Web Site	Web Site Research 100%															100%
Design	Database	Database Design 58%															58%
Production	Upgrades	Upgrades Production 16%															16%

Override Settings of Symbols Placed on the Schedule

Symbol settings can be overridden on a symbol-by-symbol basis once a symbol is placed on the schedule.

Override a symbol's color, date/text placement, size and more

Override the symbol fill color, date and text placement, transparent or opaque background setting, symbol size, symbol's vertical position within the task row, and symbol text color.

1. Click the  tool.
2. Click once on the symbol within the schedule. The **Selection** menu in the toolbar is now displayed.
3. In the **Text** tab, add or edit text, change the font, date and text placement, text alignment, transparent or opaque background setting, and angled symbol text as well as angled symbol dates.
4. In the **Size/Color** tab, change the symbol fill color, bar color, symbol size, and vertical symbol position within the task row

Override symbol text color and styles, line-by-line

Each symbol can have three lines of symbol text. Each of those text lines can be individually formatted, as an override to the default symbol text settings.

1. Click the  tool.
2. Click once on the symbol on the schedule. The **Selection** menu in the toolbar is now displayed.
3. In the **Text** tab, click the **Text Overrides** button for a symbol text **Line**.
4. Set color and text attributes, including bold, italic, and underline.
5. Repeat as needed for other symbol text entries. Click **Apply Text Changes**.

Hide all symbol date and text displays

To hide date and text display for all symbols on the schedule, choose **View | Other | Override Symbol Text and Symbol Date Display**.

Under **Dates**, choose to **Hide all symbol dates** on the schedule.

Under **Text**, choose to **Hide all symbol text** on the schedule.

This setting overrides toolbox settings and individual settings for each symbol on the schedule. Revert to the toolbox and individual symbol settings by selecting **Use Toolbox and individual symbol date/text settings**.

Symbol date prefix and suffix

Once a symbol has been placed on the schedule, you can enter any text to appear before and/or after that symbol's date display.

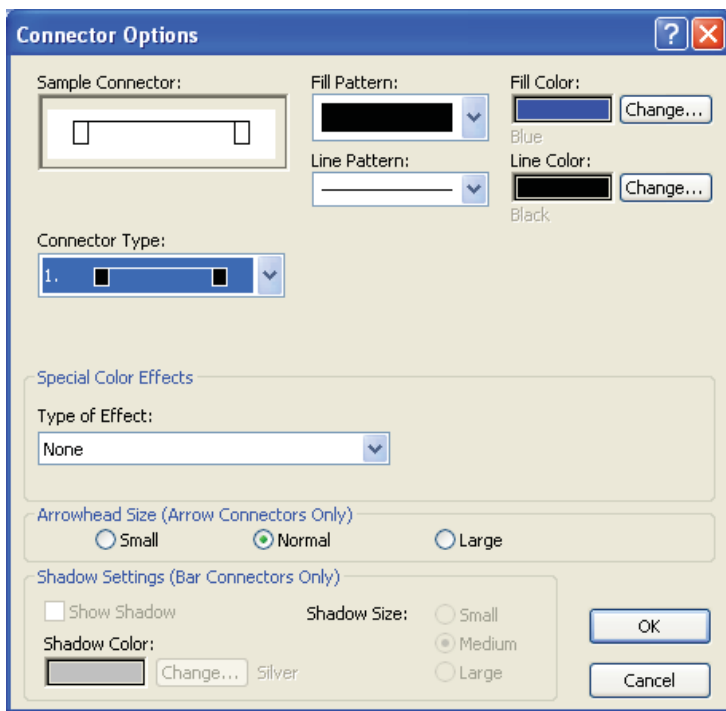
1. Click the  button in the toolbox.
2. On the schedule, click once on a symbol.
3. In the **Text** tab, next to **Date Prefix**, enter characters to appear before the symbol date.
4. In the **Text** tab, next to **Date Suffix**, enter characters to appear after the symbol date.
 - Enter a backslash (\) after the entry of the prefix to hide the date display, e.g. TBD\
 - Add a blank space after the prefix text or before the suffix text to provide separation between the text and the date display.

 **Stage 1: 1/29**  **TBD**  **SoftDate 3/24**  **4/27 or TBD**

Set Horizontal Bar Defaults

To change the attributes of a horizontal bar in the toolbox, double-click on the bar in the toolbox. Any changes to the bar in the toolbox will affect all occurrences of that bar on the schedule.

Change bar shape, pattern, colors, fade effect, and shadow



To set a bar's defaults:

1. Double-click a bar in the toolbox.
2. Click a drop-down menu  to view the options.

The **Sample Bar** changes to match your selections, as you make them.



- Choose from more than 40 **Bar Types**.
- Choose from more than 50 **Fill Patterns**.
 - » Marbled bar fill patterns are full-colored bitmaps which will ignore any *Fill Color* settings. These horizontal bar fill patterns increase the size of printer files and metafiles, especially on high-resolution printers. Thus, printing time may be increased.
- Choose a **Fill Color** that fills the inside of the bar.
- Choose the **Line Pattern** and **Line Color** that encompasses the bar.
- Choose an **Arrowhead Size** if the bar is a line with an arrow ending.
- Choose the **Shadow Settings** color and size.
- Choose a **Type of Effect** to fade from the **Fill Color** to white.

Override a bar's default fill color

The bar fill color can be overridden on a bar-by-bar basis once a bar is placed on the schedule.

1. Click the  tool.
2. On the schedule, click once on the left-most symbol to which the bar is attached. The **Selection** menu in the toolbar is now displayed.
3. Under the **Size/Color** tab, find the **Override Symbol and Bar Colors** section.
4. For **1st Bar Color**, click the  box to the right to choose a color

- For **2nd Bar Color**, click the None box to the right to choose a color

Below, the top bar is the 1st bar, since it was added first.



“Always on top” bars

This feature controls which bar appears “on top,” when two bars overlap.



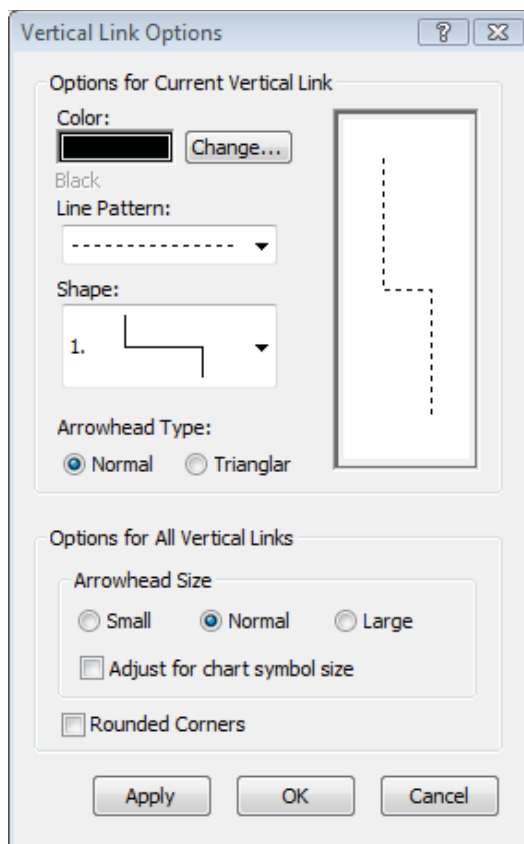
To change, for example, the longer, thinner bar to be “on top”:

- Click the  tool.
- On the schedule, click once on the left-most symbol to which the bar is attached. In this example, the left-most symbol would be the purple circle.
- In the **Selection** menu, click the **Size/Color** tab.
- ☒ **Horizontal bars from this symbol are on top of other bars.**



Set Vertical Link Defaults

To change the attributes of a vertical link in the toolbox, double-click on the link in the toolbox. Any changes to the vertical link in the toolbox will affect occurrences of that link on the schedule.



To set a link's defaults:

- Double-click a vertical link in the toolbox.
- Click the drop-down menu  to view the options.
- The sample link changes to match your selections, as you make them:
 - Choose a vertical link **Color**.
 - Choose from a variety of **Line Patterns**.
 - Choose from more than 15 vertical link **Shapes**.
 - Choose an **Arrowhead Size** if the link has an arrow ending.
 - Optionally, check **Adjust (arrowhead size) for chart symbol size** to scale the arrowheads based on the chart's symbol size setting. Without this checked, arrowheads may look too large on charts where the symbol size is less than one.
 - Rounded Corners** is a global setting that affects all other vertical links in the toolbox.

Chapter 4: Working with an Outlined Schedule

Outlining is useful for organizing your schedule at different levels. Usually you want to outline your schedule to enough levels so that at the actual task level there is a clear, definable item of work that can be identified, assigned, and tracked.

An example of an outlined schedule with an **Outline Level SmartColumn** and **Task Number SmartColumn** is shown below:

Swimming Pool Construction

Task No.	Outline Level	PROJECTS	2005			
			February	March	April	May
1	1	301 Sunspot				
2	2	Excavate				
3	2	Plumbing				
4	3	Pool Plumbing				
5	3	Hook-up Water				
6	2	Masonry				
7	1	455 Tombstone				
8	2	Excavate				
9	2	Plumbing				
10	3	Pool Plumbing				
11	3	Hook-up Water				
12	2	Masonry				

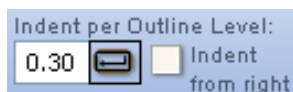
This example is outlined to three levels. The “Projects” column uses the outline level indent feature. The “Outline Level” column is an Outline Level SmartColumn that automatically fills according to outline level of each task. The Task Number SmartColumn numbers the tasks. The summary bars are manually drawn.

Outlining Tools and Formatting

To create an outlined schedule, at least one of your columns should display indented text in order to see which tasks are outlined to which levels—as in the “Projects” column on the previous page.

Set the indentation amount for column text

1. Click once on the column heading with the arrow tool. This will display the **Selection** menu.
2. Under **Current Object: Column Heading**, choose **Switch to Column**.
3. Under **Column Type and Format | Indenting per Outline Level**, enter an amount in inches, such as .25 or .30. Press the apply button 



 This is the amount of space that each successive outline level will be indented for this column.

For example, outline level 2 will be indented .30 inches from the cell's left margin, level 3 will be indented .60 inches from the left, and so on.

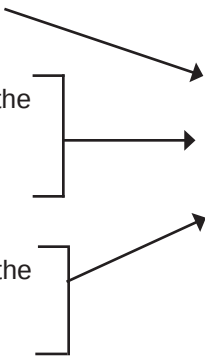
4. If you use one of the methods described on the following pages to outline task rows without first setting the text indentation amount for a column, the **Indent Column** dialog box will appear. This will allow you to choose which column you would like to indent and the indent amount.

Outlining tools

1. The Tab key on your keyboard can be used to indent tasks for outlining purposes. This feature can be turned on and off as follows:
 - Choose **Tools | Program Options | Edit**.
 - ☒ **Use TAB key for Outlining**.
 - Now, by selecting a task row and then pressing Tab, the outline level increases by 1 (e.g. from level 2 to 3). By pressing Shift+Tab, the outline level decreases by one (e.g. from level 3 to 2).
1. By selecting a task row with the arrow tool, you can quickly indent task rows using the  (outdent) and  (indent) icons found in **Selection | Task Row Settings | Outline Level**.
2. Yet another way to indent for outlining is using Alt+Shift+Left Arrow key for outdenting and Alt+Shift+Right Arrow key for indenting.

Outline tasks as you enter them

1. Click the  tool in the toolbox.
2. Click once in the first cell below the column heading, and type an Outline Level 1 task name.
3. Click the ↓ key on your keyboard to go to the next cell in the column.
4. Press the **Tab** key (or click the  icon), and type the Outline Level 2 task name.
5. Click the ↓ key on your keyboard to go to the next cell in the column (cursor is displayed).
6. Use Tab or , and enter the next task name.



TASK	Start
Project	
Task A	

Outline existing tasks

If the task names are already entered, you can outline those existing tasks.

1. Click the  tool in the toolbox.
2. Hold the **Ctrl** key on your keyboard.
3. In the task column, click once on all tasks that should be indented (below left).
4. In **Selection | Task Row Settings**, Click the  button. The selected tasks indent one outline level (below right).

Outline Level	TASK	February
1	Database Project	
1	Task 1	
1	Task 2	
1	Task 3	
1	Web Site Project	
1	Task 1	
1	Task 2	
1	Task 3	

Outline Level	TASK	February
1	Database Project	
2	Task 1	
2	Task 2	
2	Task 3	
1	Web Site Project	
2	Task 1	
2	Task 2	
2	Task 3	

Outline Level SmartColumn

This column is a great tool to keep track of each task row's outline level, yet it is not necessary in order to outline. As each task row is indented/outdented, the Outline Level SmartColumn's numbers changes automatically.

To add an Outline Level SmartColumn:

1. Choose **Insert | Rows, Column | New Column | Outline Level**.
2. To edit the column's properties (such as column title), click once on the new column's heading. This will display the **Selection** menu.

As you indent/outdent your schedule tasks, the outline level value changes automatically. Likewise, when you enter a value in the Outline Level SmartColumn, the tasks indent/outdent accordingly.

Summary Row Display

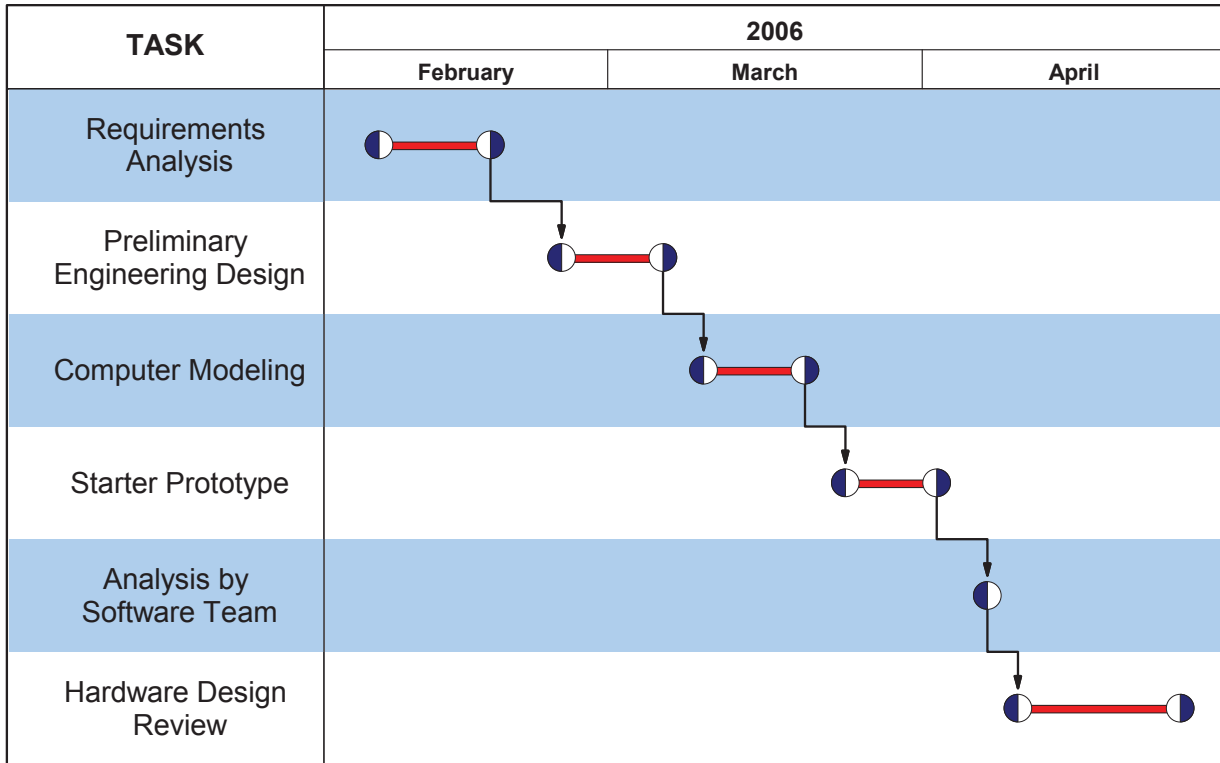
Summary bars do not automatically appear on upper task levels. You can manually add summary bars as you would any other symbol+bar+symbol combination.

Chapter 5: Dependencies and Vertical Links

Milestones Simplicity's dependency (predecessor/successor; parent/child) capabilities enable you to link task dates so that when one date changes, the dates that are dependent upon that date also change.

Within any one schedule, symbols on different task rows are linked using vertical links, as shown in the example below. Any of 15+ vertical link shapes can be used. Any symbol can have up to 5 vertical links extending from it.

Hardware Design Schedule



Dependency Mode and Display

Dependency Mode may be on or off. If Dependency Mode is on, then symbols that are dependent upon other symbols (successors) will move when the parent (predecessor) symbol moves. When Dependency Mode is off, then dependent symbols do not move.

The on/off status of Dependency Mode is shown in the Status Bar at the bottom of the Milestones Simplicity screen, as circled below:



Turn Dependency Mode on and off

Dependency Mode is either on or off for the whole schedule. It is a global setting.

- Choose **Dates | Date Related Settings | ☒ Dependency Mode**.
- A check mark by Dependency Mode indicates that it is on.

- or -

1. Click the  tool in the toolbox.
2. Right-click any symbol.
3. Choose **Turn On Dependency Mode** or **Turn Off Dependency Mode**.
 - Even though you only selected one symbol and turned the dependency mode on or off, this setting applies to the whole schedule.

Show or hide the vertical links

The task links (vertical links) which establish dependencies may be visible or hidden.

1. Choose **View | Optional Items | ☒ Task Links**.
 - A check mark next to the Task Links option means that vertical links are currently being displayed.
 - If there is no check mark, then click the menu once to make the check mark appear.
 - Even when the vertical links are hidden, the rules for the movement of parent (predecessor) and dependent (successor) symbols still apply.

Symbol Dependencies and Movement

When Dependency Mode is on, a symbol is dependent (successor) if it comes after (to the right of) the parent symbol (predecessor) on the same line, or if a vertical link runs from the parent symbol to the dependent symbol on another task row.

Vertical links can go both up and down, so dependent symbols can actually be on task rows above the parent symbol.

In the example on the first page of this chapter, a vertical link with a “from-to” arrowhead is used to easily see the direction of the dependencies.

- If Dependency Mode is on, then dependent symbols will always shift if the parent symbol is moved with the mouse.
- If you try to change an individual symbol's date in the **Selection** menu or the **Symbol Properties** dialog box, you will be prompted to allow/not allow dependent symbols to shift.
- If you right-click a symbol when dependency mode is on, choose **Highlight Dependent Symbols** to easily see all symbols dependent on the selected symbol.
- If you change an end date in a SmartColumn, dependent symbols will shift accordingly.

	If the February 8th symbol is moved to the right, the triangle symbol will move an equal amount. The 2/3 symbol will not move because it is to the left of the 2/8 symbol. Thus, the 2/8 symbol is the parent symbol, and the 2/15 symbol is dependent on its movement. The vertically linked symbols are also dependent symbols.
	Here, the 2/8 symbol is moved 10 days to the right, as shown in the tooltip box that appears as the symbol is moved. All symbols linked to the parent symbol and to the right of the parent symbol on the same task row are dependent and should move an equal amount.
	All dependent symbols have shifted 10 working days, matching the movement of the parent symbol. The 2/3 symbol remained in place because it is to the left of the parent symbol.

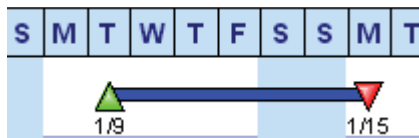
Move dependent symbols based on duration

By default, when moving a symbol (predecessor), that symbol's dependent symbols (successors) may be moved to a date outside the workday time period or to a non-working day.

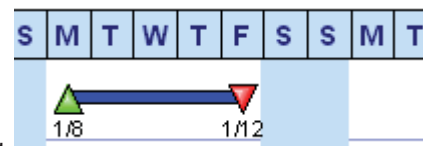
By checking **Always move dependent symbols based upon duration** as found under **Tools | Program Options | Dates**, the dependent tasks will move the amount of working time the parent symbol was moved. This prevents tasks from being pushed into non-working times and ensures duration values remain constant for the dependent tasks.

Example:

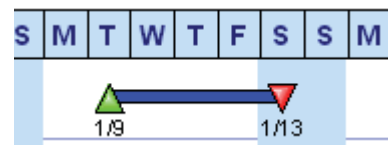
In this example, the task begins on Monday and ends on Friday. The weekends are shaded and are non-working days.



With **Always move dependent symbols based upon duration**, moving the start date forward by one day would result in the end date moving ahead one day, to the next working day, as shown to the left. The duration would remain as five days.



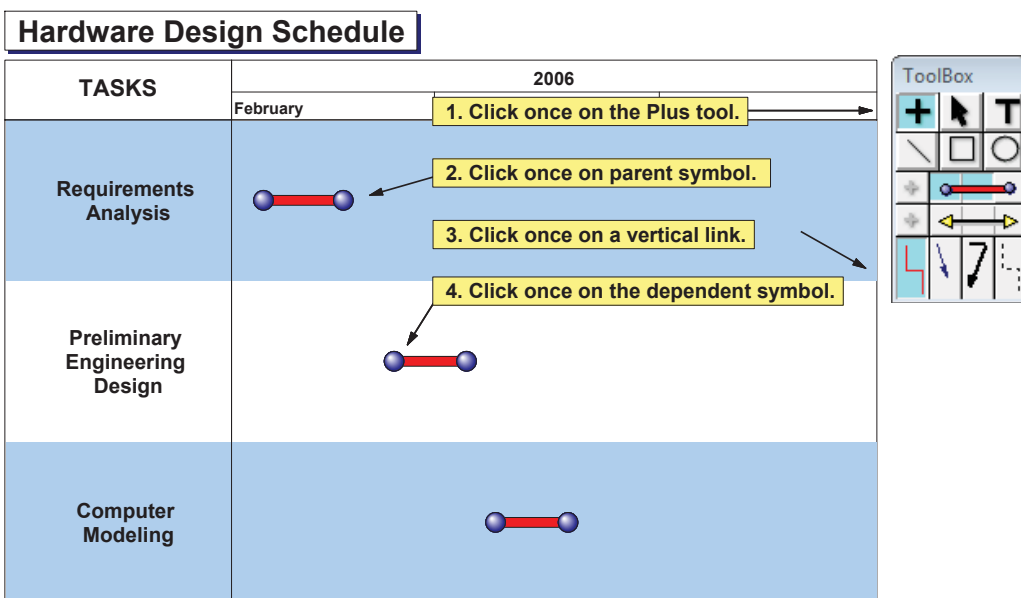
With ☐ Always move dependent symbols based upon duration, moving the start date forward by one day would result in the end date moving ahead one day, to the next day regardless of working/non-working days, as shown to the right. The duration would change to four days if weekends are non-working days.



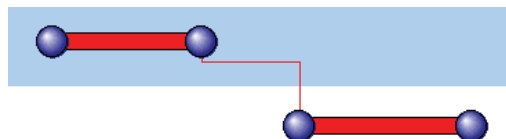
Add and Edit a Vertical Link

There are three methods for adding vertical links between symbols on different task rows: (1) Add a vertical link between two symbols using the mouse; (2) add a vertical link between two symbols using the **Selection** menu; (3) add vertical links between symbols on selected task rows using the **Insert** menu.

Follow the directions in the schedule below to add a vertical link with the mouse:



If this exact order is used, then the chosen vertical link will appear between the two symbols, as shown to the right:

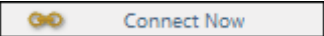


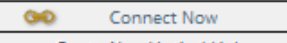
If you continue to add links after these four steps, then you can skip step 1 and begin the next link procedure with step 2. If other actions are performed (e.g. moving a symbol), then you should begin with step 1 when adding another vertical link.

If your vertical links are not displayed, make sure the option to display task links is checked. Refer to page 5-2 for more information.

Add a vertical link using the toolbar

Use this method if you would prefer to use the toolbar rather than the plus tool to create a single vertical link. This method is best when you want no more than one link extending from each symbol.

1. In the toolbox, click once on  and once on the parent symbol of the vertical link you wish to add. This will display the **Selection** menu for that symbol.
2. Go to **Selection | Vertical Links | Create New Vertical Link**.
3. Press the **Set** button on the **From Symbol** line. The boxes on this line should turn from red to green.
4. In the toolbox, click once on  and once on the dependent symbol of the vertical link you wish to add. This will display the **Selection** menu for that symbol.
5. Go to **Selection | Vertical Links | Create New Vertical Link**.
6. Press the **Set** button on the **To Symbol** line. The boxes on this line should turn from red to green.
7. Press .

From Symbol	Row: 1	Symbol: 1	
To Symbol	Row: 1	Symbol: 1	
			
Create New Vertical Link			

Add vertical links between symbols on multiple task rows

This method is best when each of your task rows contains one start symbol and/or one end symbol.

1. In the toolbox, click once on  and once on the vertical link you wish to add.
2. Hold the **Ctrl** key on the keyboard, and then click on each of the task rows whose symbols will be vertically linked (click in the column area of the task row).

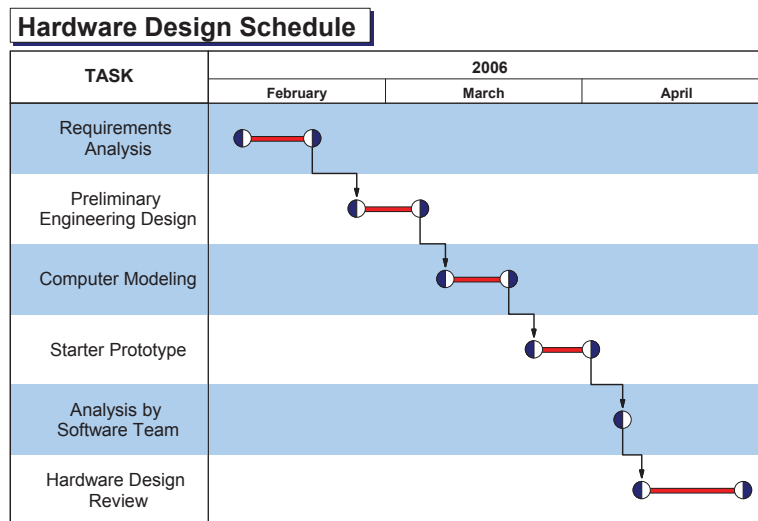
The chosen task rows (here, lines 1, 2, 4, and 6) will highlight in black, as shown to the right:

Hold the **Shift** key if you need to select a range of task rows.

Hardware Design Schedule			
TASKS	2004		
	February	March	April
Requirements Analysis			
Preliminary Engineering Design			
Computer Modeling			
Starter Prototype			
Analysis by Software Team			
Hardware Design Review			

3. Choose **Insert | Vertical Links | Vertical Links between selected task rows**.
 - Choose to make Upward or Downward links between symbols.
 - Choose the type of link: **Finish-to-Start**, **Start-to-Start**, **Start-to-Finish**, **Finish-to-Finish**.

This is the result of a *Finish-to-Start* choice:



Edit an existing vertical link

Chapter 3 discusses how to change the default settings for vertical links. Here is how to change a single vertical link that is already on the schedule, from one type to another.

1. In the toolbox, click the  tool.
2. On the schedule, click once on the symbol from which the link extends.
3. In the toolbox, click once on the new vertical link. The new vertical link appears.

Remove Vertical Links

Vertical links can be removed from their originating symbols by selecting either a single symbol, a task row containing multiple parent symbols, or multiple task rows containing vertical links.

Remove a single vertical link

1. In the toolbox, click the  tool.
2. On the schedule, right-click the parent symbol from which the link extends.
3. Choose **Clear Vertical Links**.

Remove vertical links from all symbols on a single task row

1. Right-click the task row (in the column area) that contains parent symbols whose vertical links you wish to remove.
2. Choose **Clear Vertical Links**.

Remove vertical links from all symbols, selected task rows

1. In the toolbox, click the  tool.
2. Hold the **Ctrl** key and click once on each task row (in the column area) that contains parent symbols whose vertical links you wish to remove. This will display the Selection menu.
3. Choose **Selection | Task Row Settings | More Task Row Options | Clear Vertical Links**.

Remove selected vertical links from a single symbol

1. In the toolbox, click the  tool.
2. Click once on the parent symbol from which the links extend.
3. Choose the **Vertical Links** tab.
 - The vertical links are numbered under **Link**.
 - **Linked to Task Row** indicates the task row number at which the vertical link ends.
Linked to Symbol indicates the symbol at which the vertical link ends. The number is the symbol's position counting from left to right with a base of 1.
4. Click the **Break Link** button for the appropriate vertical link.

Chapter 6: Formatting and Layout

Milestones Simplicity offers the most complete and flexible layout of any project management package available. You have complete control over page size, rows per page, individual row height, and all other layout aspects of your schedule.

Layout

In the new Enhanced Toolbar, choose the Layout tab to access formatting choices such as page size, legend size, row size, and symbol size.

Change the chart size and margins

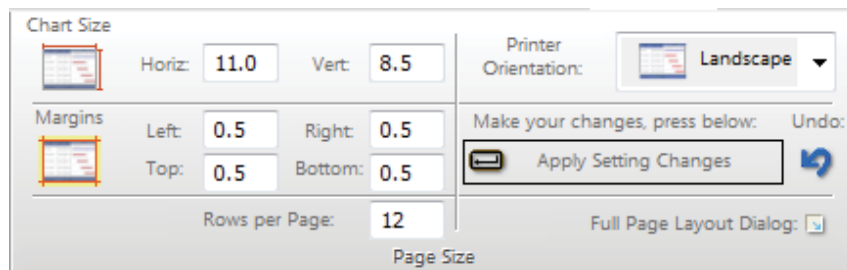


Chart Size		Printer Orientation: Landscape	
Horiz:	11.0	Vert:	8.5
Margins		Make your changes, press below: Undo:	
Left:	0.5	Right:	0.5
Top:	0.5	Bottom:	0.5
Rows per Page: 12		Apply Setting Changes	
Page Size		Full Page Layout Dialog: [button]	

1. Choose **Layout | Page Size**.
2. Next to **Chart Size**, enter a horizontal and vertical value in inches.
3. Next to **Margins**, enter a value in inches for the Left, Right, Top and Bottom margin areas.
4. Next to **Printer Orientation**, choose Landscape or Portrait.
5. Next to **Rows per Page**, enter the number of rows that should appear on each page.
6. Select the **Apply Setting Changes** button. You must press the apply button in order for all changes made to the **Layout | Page Size** menu to take effect.

Rows per page and row height

Display 2 to 300 rows per page. If you override the height of one or more individual rows, then the actual number of rows on that page may be more or less than the rows per page value in **Layout**. That is, if a row height is decreased, then the rows per page may increase; if the height is increased, the rows per page may decrease.

The default row height is based upon the available space for rows divided by the number of rows per page. If you choose **Layout | Row/Symbol Sizes | Reset all rows to default height**, then any row heights that you modified will be reset to the default value. The number of rows per page will also be restored.

Scaling the chart size to the current paper size

To access the current paper size, click on the Full Page Layout dialog button found in the bottom right of the Page Size section. **Full Page Layout Dialog:** [button]

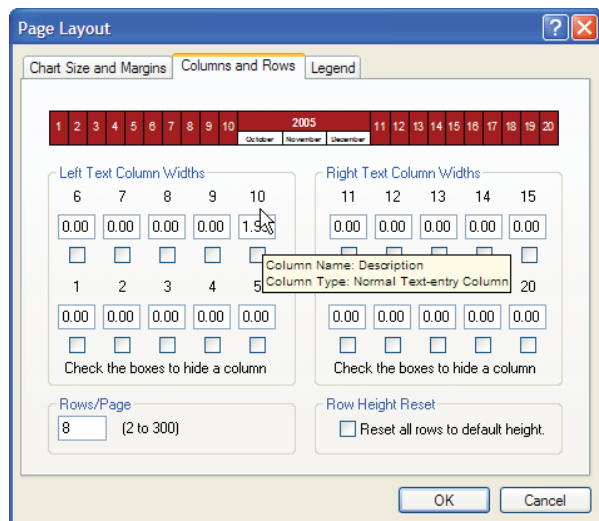
Create stamp-size to wall-size schedules. The maximum horizontal and vertical chart size is approximately 300 inches, or 25 feet. When the schedule prints, Milestones Simplicity will either scale each page of your schedule to fit within the **Current Paper Size**, or it will allow each page to span as many sheets of paper as needed, depending upon the printing options you select. To avoid the need for scaling, it is best to make sure that your **Chart Size** exactly matches the **Current Paper Size**.

The measurements in the **Page Layout** dialog box are shown in U.S. inches. If your regional settings are set to use metric, then the measurements will be shown in centimeters.

The **yellow border** surrounding the sample chart (seen here or in the **File | Printing | Print Preview** screen) shows the unusable area of the paper where the printer cannot print, as reported by your current printer. You should keep the margins large enough so that no part of the sample goes into the yellow area.

Change the number of columns

Milestones Simplicity allows for up to 20 columns—10 on each side of the schedule. Columns may contain text, dates, values, and symbols.



 The number and size of columns directly affects the amount of space available in the schedule area under the date headings. By increasing the horizontal chart size, you gain more horizontal space for columns and for the schedule area.

1. Choose **Layout | Page Size | Full Page Layout Dialog**. Click on the **Columns and Rows** tab.
2. Under **Left Text Column Widths**, enter a value in inches in order to create a column on the left side of the schedule.
4. Under **Right Text Column Widths**, enter a value in inches in order to create a column on the right side of the schedule.
5. A ☒ under a column number means that column will be hidden.

Column numbering

Columns are numbered from 1 to 10 on the left side of the schedule, and from 11 to 20 on the right side of the schedule, as shown in the column numbering graphic under the **Columns and Rows** tab.

Column 10 is closest to the schedule area on the left side of the schedule; column 11 is closest to the schedule area on the right side of the schedule.

For example, if only one column is on the left side of the schedule, it would be column number 10.

Hide and unhide columns

If you check the box to hide a column, then the width will be remembered and restored if you later unhide the column. Columns of zero width are automatically not displayed; however, zero width columns must always be on the outer edges of the schedule. For example, if column 10 is marked as 0.0 width and column 9 is marked as 1.0 width, after you press OK, the 1.0 will be moved to column 10.

It is best to use the hide check boxes if you need to hide a column that has data in it, instead of entering a 0.0 width value to essentially “hide” a column. Unhidden columns marked as 0.0 width will eventually have their data blanked out.

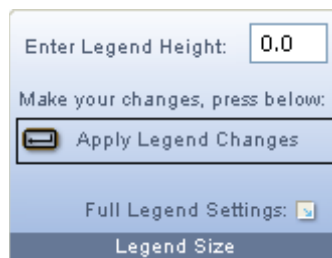
Legend

Create a legend

The legend is the area reserved for documenting the usages of the various symbols, horizontal bars and vertical links on your schedule. The only meaning of a symbol or bar is that which you give it.

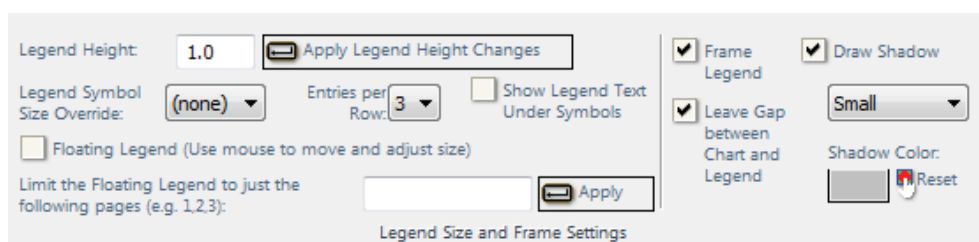
You can access the full legend properties in two ways. The first is to stay within the **Page Layout** dialog box as depicted on the previous page. Choose the **Legend** tab to edit its properties. The second way is described below.

1. Choose **Layout | Legend Size**. Next to **Enter Legend Height**, enter a value in inches.
2. Choose the  **Apply Legend Changes** button.
3. Choose the **Full Legend Settings**  button to access more Legend options. This will display the **Selection** menu for full legend properties.



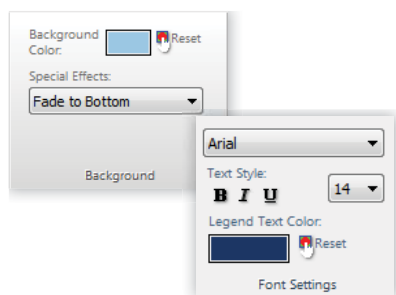
Format a legend

When the full legend settings are accessed, there are many options available for customization.



1. The legend symbols and bars use the default symbol size setting. Enter a value next to **Legend Symbol Size Override** to override the default setting for legend entries.
2. Use the drop-down menu next to **Entries Per Row** to enter the number of legend entries to display on each row in the legend.
3. Choose ☒ **Show Legend Text Under Symbols** to place legend text directly underneath the legend symbols. This helps to condense overcrowded legend entries.
4. ☒ **Floating Legend** to be able to position the legend anywhere.
 - Optionally, **Limit the Floating Legend to just the following pages** to assign a floating legend to particular pages within the schedule. Enter in the page numbers separated by commas and press the  button.
5. ☒ **Frame Legend** to draw a border around the legend area.
6. ☒ **Draw Shadow** to display a shadow around the legend. Select the shadow size from the drop-down menu and choose a Shadow color by selecting the color box next to the reset button.
5. ☒ **Leave Gap between Chart and Legend** to separate the last task row in the schedule from the legend border.

Legend background color and font settings



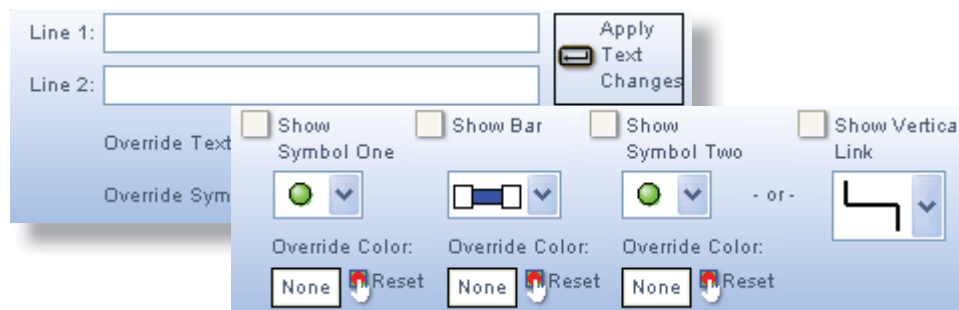
In the **Background** section, click on the color box next to **Background Color** to change the color of the legend. To fade that color to white, choose from one of the **Special Effects** for the two colors to fade together.

In the **Font Settings** section, choose the legend font, font size, text style, and legend text color.

Legend entries

The Legend height should be large enough to hold the number of entries that you plan to have. Legend entries are placed left to right, in the order in which they are created. Once created, these entries can be edited, moved, or deleted.

Add a legend entry



1. Choose **Insert | Picture, Legend | New Legend Entry**.
2. Next to **Line 1** and **Line 2**, enter the Legend Text. Press the  **Apply Text Changes** button.
3. **Override Text Color** and **Override Symbol Size** will change the text color or symbol display size for this legend entry only. The bar size is not affected.
4. Select any or all of the **Show Symbol One**, **Show Bar**, and **Show Symbol Two** options; or select a **Show Vertical Link** to appear with the text.
 - All symbols and bars in the drop-down boxes under **Show Symbol One**, **Show Bar**, **Show Symbol Two**, and **Show Vertical Link** are those available in the toolbox. If the symbol or bar is not available in the legend entry dialog box, then add it to the toolbox
5. Click a drop-down arrow to view and make selections.
6. Choose an optional **Override Color** for symbols and horizontal bars.

Move a legend entry

Once two or more legend entries are present, simply click-and-drag to move them.

1. In the toolbox, click the  tool.
2. Position the cursor over the legend entry to be moved.
3. Click and hold the left-mouse button, and then drag to a new location in the legend. As you move the mouse, the cursor will look like this: .
4. Release the mouse button, and the legend entry will appear, shifting all other entries to the right and down, if there is more than one row of entries.

Move and resize a floating legend

Resize a floating legend by moving the cursor to the right or left edge or a corner, then click-and-drag with the  or  cursor. Move a floating legend by moving the cursor to the bottom or top edge of the legend, then click-and-drag with the  cursor.

Delete a legend entry

To delete a Legend entry, either right-click on the entry and select the **Delete Legend Entry** option, or click once on it and select the **Delete This Entry** option from the **Selection** menu (or press the Delete key on your keyboard).

Columns

You can use the **Columns and Rows** tab in the **Full Page Layout Dialog** box to insert columns by simply changing a width from 0.0 to some other value, but the easiest way to insert columns is to simply use the **Insert** menu.

Insert a column

To insert a column next to the schedule area (then you can move it):

- Choose **Insert | Rows, Columns | New Column** and select from the list of column types. The column will appear closest to the schedule area, on the left side. When the left side of the schedule contains 10 columns (maximum number allowed), the new column will appear on the right side.

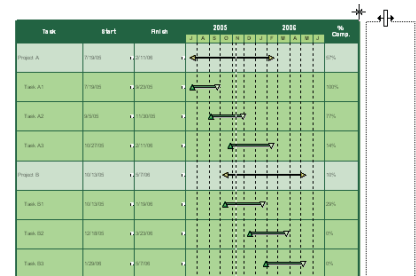
To insert a column between two existing columns:

1. Click the  tool.
2. Right-click the column heading and choose **Insert Column**. The new column will appear to the left of the selected column.

Move a column

1. Click the  tool.
2. Move the cursor to the top edge of the column to be moved, until the cursor becomes a .
3. Click and hold the mouse button, and then drag to the new location. As you drag, a faint outline of the column moves with the cursor.
4. An insert point  will appear, showing you where the column will appear when you release the mouse button.

When you move a column to the far left or far right edge, you may need to grab the column near the column's left or right edge to allow room for the column to clear the edge of the chart.



Task	Start	Finish	2005	2006	% Comp
Project A	1/1/05	1/1/06			100%
Task A1	1/1/05	1/1/05			100%
Task A2	1/1/05	1/1/05			100%
Task A3	1/1/05	1/1/05			100%
Project B	1/1/05	1/1/06			100%
Task B1	1/1/05	1/1/05			100%
Task B2	1/1/05	1/1/05			100%
Task B3	1/1/05	1/1/05			100%

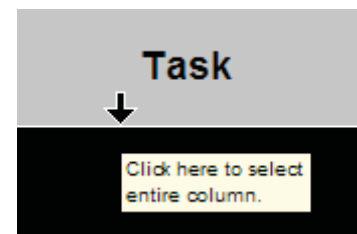
Remember that the total width of all the columns together takes away from the area reserved for the schedule. If your column widths must be so wide that there is no room left over for the schedule, then you need to consider changing your chart width.

Delete a column

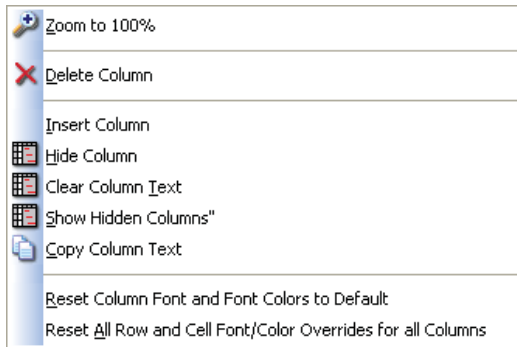
1. Click the  tool.
2. Right-click the column heading and choose **Delete Column**.

-or-

1. Click the  tool.
2. Select the column by left-clicking the mouse at the bottom of the column heading cell, as shown to the right.
3. Press the Delete key on your keyboard.



Right-click to edit column



When the cursor turns to an arrow ↓ for selection of a column and you right-click, the menu display offers many editing choices.

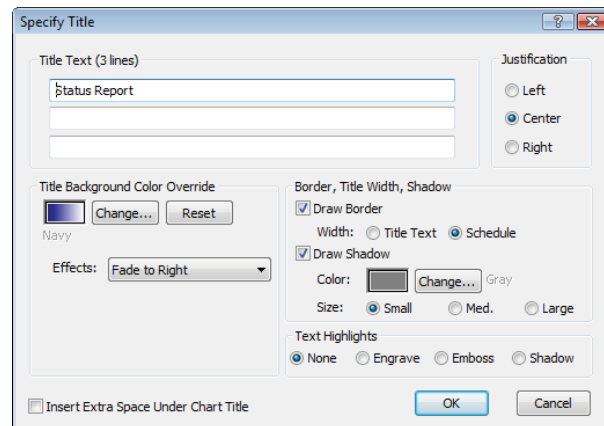
Choose **Clear Column Text** to delete text in the column cells without deleting the column.

Choose **Reset Column Font and Font Colors to Default** to revert to default column text font, color and size settings in the selected column.

Color themes do not override a column's cell-by-cell settings. To reset all individual overrides made to column cell text color and size back to the schedule defaults, choose **Reset all Row and Cell Font/Color Overrides for all Columns**.

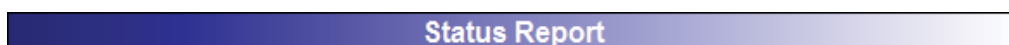
Chart Title

Enter up to three lines of text for the chart title. The title can have a background color, frame, shadow, text highlights, and special effects shading.



1. To add a chart title, choose **Insert | Title | Insert/Edit Chart Title**.
2. Under **Title Text**, click once and enter text.
3. Under **Title Background Color Override**, click **Change** and choose a color.
4. Choose fade **Effects** for fading from the background color to the target color.
5. Choose a text **Justification**.
7. Under **Border, Title Width, Shadow**, choose to ☒ **Draw Border** around the title. The border can extend the width of the **Title Text** or the width of the **Schedule**.
8. Choose to ☒ **Draw Shadow** and choose its **Color** and **Size**.
9. Under **Text Highlights**, choose **None**, **Engrave**, **Emboss**, or **Shadow**.
11. ☒ **Insert Extra Space Under Chart Title** to increase the amount of space between the title and the schedule.

The options above would result in the following chart title:



Date Headings

You can have up to 4 levels of Date Headings on your schedule, shown above the schedule area, below the schedule area, or both. The Date Headings are used as a reference point for the symbols and bars on your schedule.

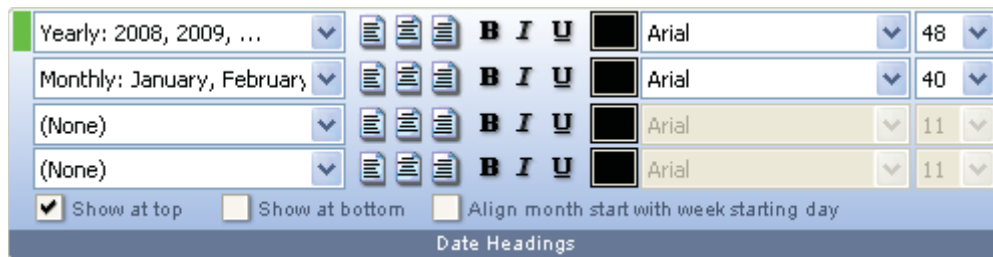
You should select headings that are appropriate for the time span of your schedule and the amount of horizontal space over your schedule area. For example, daily headings in a schedule displaying one year would not be appropriate for an 8.5" by 11" page size, since it would be difficult to squeeze 365 daily divisions into the amount of space available.

Format the Date Headings

To bring up the menu for formatting the date headings:

1. On the schedule, click the once on the date heading. This should display the **Selection** menu. This menu can also be found under **Dates | Date Headings | Date Headings Full Dialog**.

The following menu appears:



2. For any of the four available headings, click the drop-down arrow and choose a heading type. Choose from 35 standard date heading styles ranging from years to minutes and 4 user-created custom headings.
3. Choose ☒ **Align month start with week starting day** in order to line up the month headings with the week headings.
4. Under **Background**, click the the color box and choose a background color. Choose an optional **Effects** for fading from the background color to white.



Date heading Start number

If the date heading type is a series of non-repeating numbers, then you can choose a **Start** number.



For example, the heading *Monthly 1, 2, 3,...12, 1* cycles from 1 to 12, then begins again at 1. A Start number would be ignored with this heading type.

The heading *Monthly 1, 2, 3,...12, 13* begins with 1 and does not start over; therefore, you can use a **Start** number. This is the setting for such a date heading:



This is the result of this date heading in a one-year schedule:

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
3	4	5	6	7	8	9	10	11	12	13	14

For a countdown heading, enter a negative *Start* number, such as –12 instead of 3:

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
12	11	10	9	8	7	6	5	4	3	2	1

Date heading Frequency number

Any of the standard heading types can have the **Frequency** altered. For example, for a schedule that covers fifty years, you might want to set the frequency to 10, so that on a yearly heading, only every 10th year is displayed, such as 2000, 2010, 2020, etc.

Below is the result of a date heading format in which the **Frequency** has been changed to 10. In this example, the schedule dates are from 1/1/2000 to 12/31/2059. The 2000 heading spans from 1/1/2000 to 12/31/2009; the 2010 heading spans from 1/1/2010 to 12/31/2019; and so on.

2000	2010	2020	2030	2040	2050
------	------	------	------	------	------

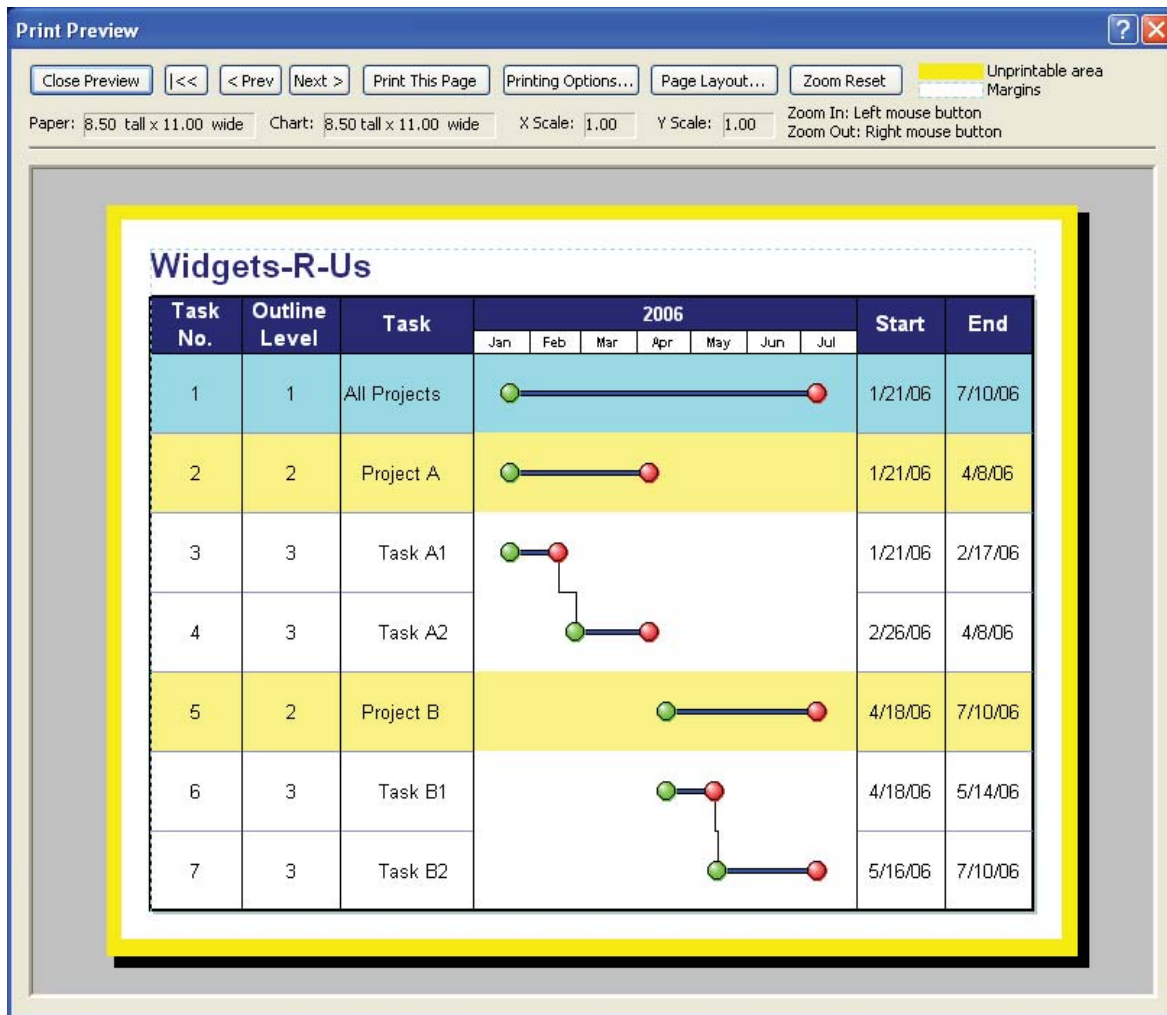
Chapter 7: Printing

With Milestones Simplicity you can print stamp-size to wall-size schedules using a variety of printing options.

Print Preview

Use the *Print Preview* feature to see a sample of how the schedule will print.

1. Choose **File | Printing | Print Preview** 
2. Click the **Prev** and **Next** buttons to move from schedule page to page.



3. Click **Printing Options** for output format selections (addressed in the next section).
4. Click **Page Layout** to change the chart size, margins, and rows per page.
5. Point the cursor to a part of the schedule and zoom-in by clicking the left mouse button; zoom-out with the right mouse button.

The light blue dashed line around the edges shows the margins that you have selected. The yellow border identifies the unprintable portion of the schedule. If your chart extends into this yellow area, it may be cut off when it is printed.

Print Setup

Use the Print Setup option to change to a different printer or to make changes to your current printer's settings.

Choose **File | Printing | Print Setup** . Choose the **Printer**, the printer **properties**, the **Paper Size** and **Source**, and the page **Orientation**.

Printing Options

To format the printing output of your schedule, choose **File | Printing | Printing Options** .

General tab

- **Symbol Notes and Collapse/Expand Indicators**
- **Color**
- **Specify Output Size**

Within these options, you can choose to:

☒ **Include Symbol Notes Page** to print a separate page containing the Symbol Notes entries. These will be numbered according to the numbered symbols on the schedule, so that you can match the notes to the symbols.

☒ **Only Print Symbol Notes for Printed Symbols** to print only notes within the specified date range (as set under the *Print by Date Range* tab); thus ignoring notes from symbols that are outside the date range being printed.

☒ **Include Collapse/Expand Indicators on Output** to print summary roll-up indicators if they are shown on the schedule.

☒ **Always include note indicators on prints and metafiles** to print symbol note indicators if they are shown on the schedule.

☒ **Print Colors in Shades of Gray** to cause the software to use shades of gray on non-color printers. Generally, this should be selected.

☒ **Force Color Output** to ensure that color commands are sent to color printers. It is ignored on non-color printers. Generally, this should be selected.

Background Colors (Also Affects Column Background)

☒ **Include on Prints and Metafiles** to print the background color as set in **Format | Frame, Highlights | Background color, border, frame corners**.

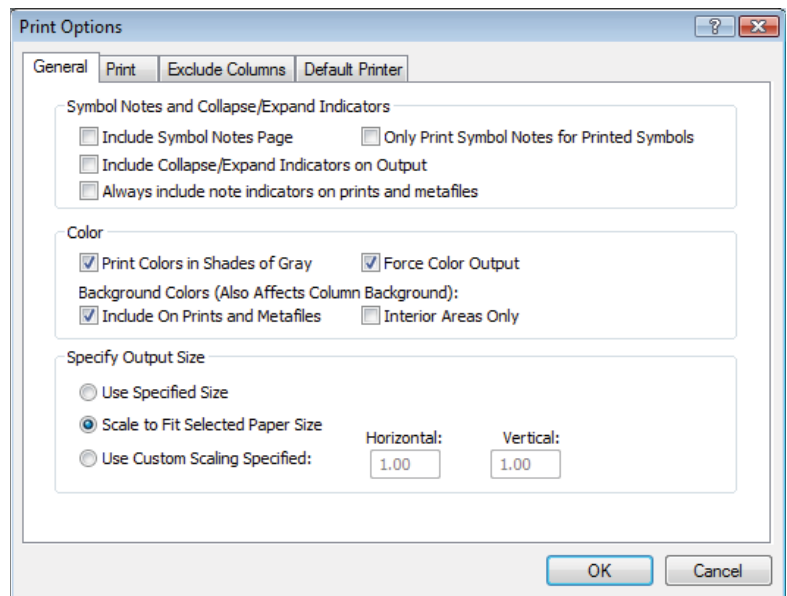
☒ **Interior Areas Only** to print the background color only within the schedule frame. Areas outside of this frame will not be shaded.

☒ **Use Specified Size** to retain the schedule's horizontal and vertical size settings as set in the **Layout** menu. This setting allows the schedule page to span across multiple sheets of paper. This option is also important to choose if you have placed graphics or free-form text on your schedule.

☒ **Scale to Fit Selected Paper Size** to force the size of the schedule to scale down or up to the size of the printing paper.

☒ **Use Custom Scaling Specified** to increase or decrease the horizontal and vertical scale of the schedule. For example, change the *Horizontal* factor to .5 to reduce the schedule size horizontally by 50%. The default scaling factor of 1 is for 100%. Note that if you use custom scaling, you cannot make a schedule page span across multiple sheets of paper. Only the **Use Specified Size** option allows that.

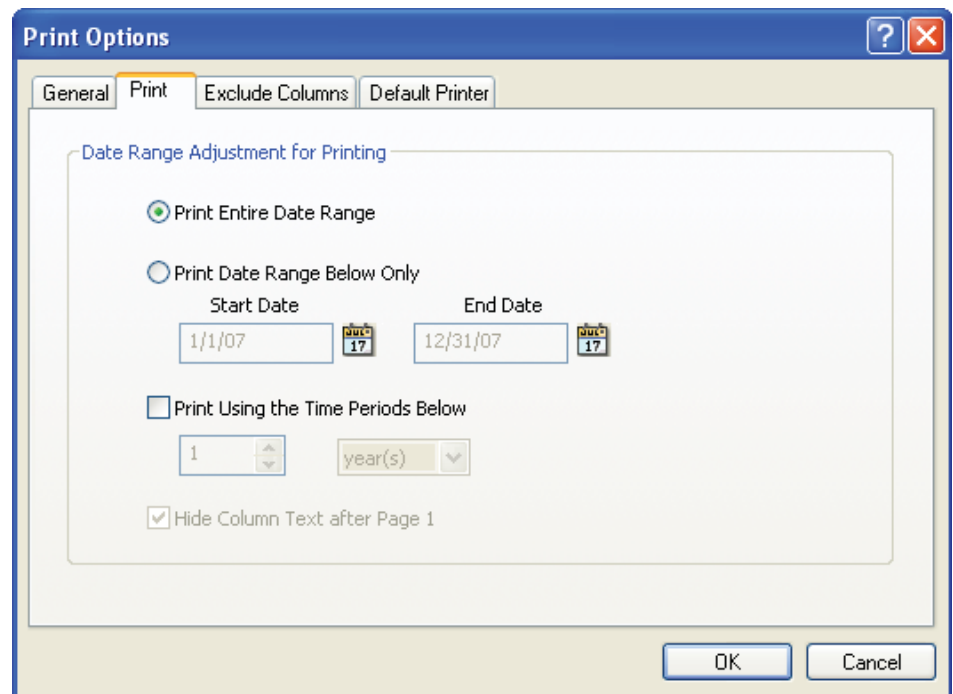
If you call up the **Printing Options** dialog box while in **Print Preview**, the option ☒ **Preview Selected Lines Only** is visible. This option allows you to preview selected task rows within the Print Preview screen.



Print tab

Choose to print the entire schedule date range or a specific date range portion of the schedule.

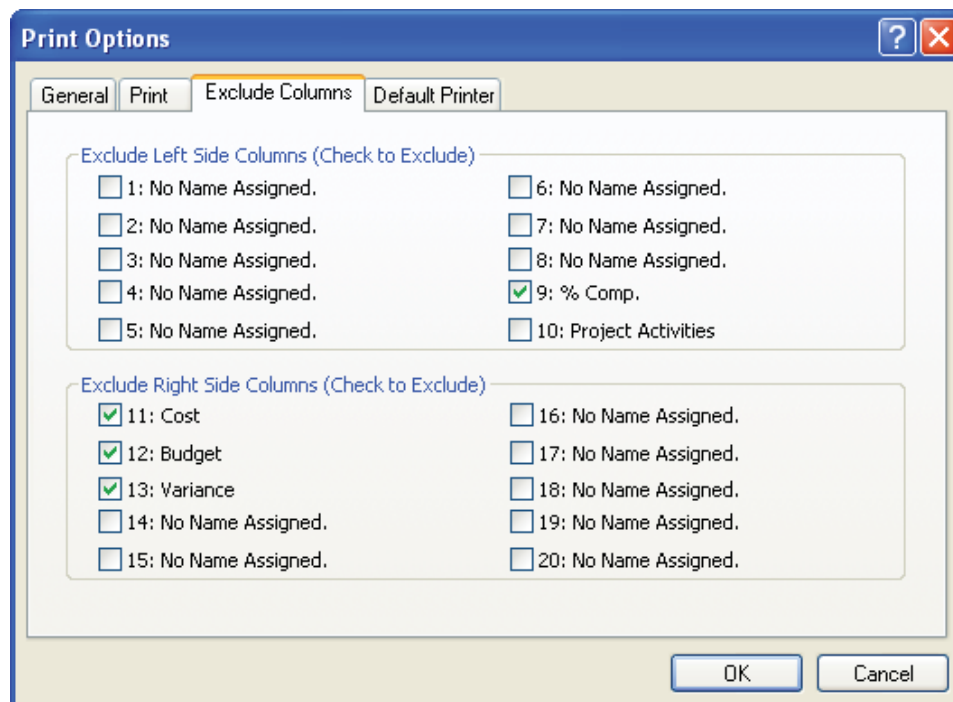
- **Print Entire Date Range** to print the schedule from start date to end date as set under **Dates | Start and End Dates**.
- **Print Date Range Below Only** to specify the start and end date range to be printed. Enter a **Start Date** and **End Date**, or click the calendar icons to choose each date.
- **Print Using the Time Periods Below** to select a time period to be printed on each page.



The 'Print Options' dialog box is shown with the 'Print' tab selected. The 'Date Range Adjustment for Printing' section contains three radio buttons: 'Print Entire Date Range' (selected), 'Print Date Range Below Only', and 'Print Using the Time Periods Below'. Below the second radio button are 'Start Date' and 'End Date' fields with calendar icons. Below the third radio button is a spinner set to '1' and a dropdown set to 'year(s)'. A checkbox 'Hide Column Text after Page 1' is checked. 'OK' and 'Cancel' buttons are at the bottom right.

Exclude columns when printing

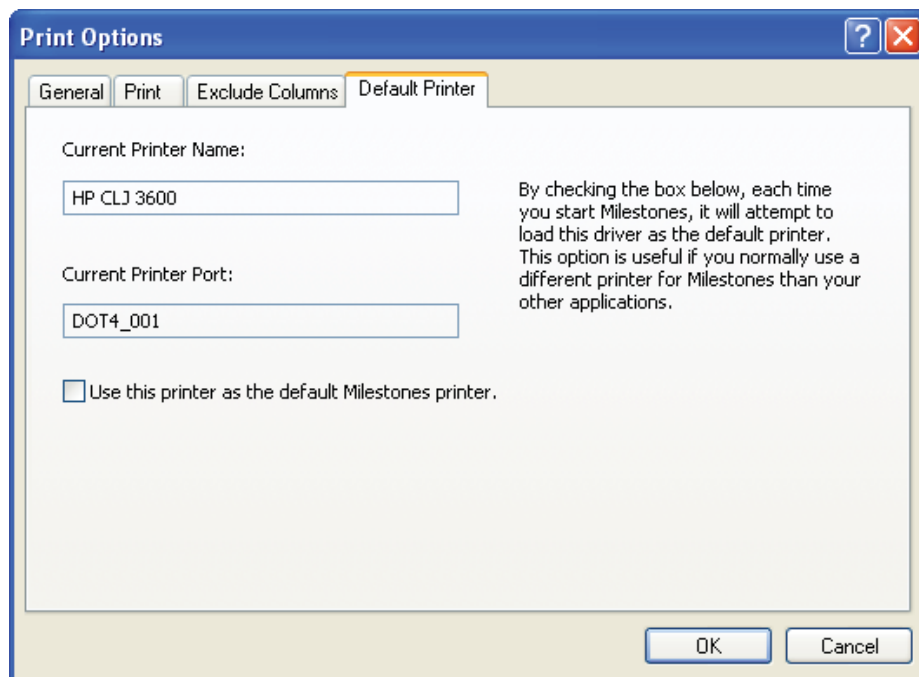
Under the **Exclude Columns** tab, check each column that should be hidden while printing. Column heading text appears next to column numbers. In this example, all but the “Project Activities” column is hidden for printing purposes:



The 'Print Options' dialog box is shown with the 'Exclude Columns' tab selected. It contains two sections: 'Exclude Left Side Columns (Check to Exclude)' and 'Exclude Right Side Columns (Check to Exclude)'. Each section has a list of checkboxes with column numbers and names. In the left section, column 9 '% Comp.' is checked. In the right section, columns 11 'Cost', 12 'Budget', and 13 'Variance' are checked. All other columns are unchecked. 'OK' and 'Cancel' buttons are at the bottom right.

Default printer

The **Default Printer** tab is useful if you normally use a different printer for Milestones than the printer you have set as the default on your computer. If you check ***Use this printer as the default***, then each time Milestones starts, it pre-selects this printer as the current Milestones printer.



Chapter 8: Working with other Applications

Milestones Simplicity interacts with other applications in several ways. You can copy and paste a Milestones Simplicity schedule into another application such as Word, Excel, and PowerPoint. The schedule can be a picture or an embedded or linked object.

You can also copy and paste information from another application, such as an Excel spreadsheet, into Milestones Simplicity.

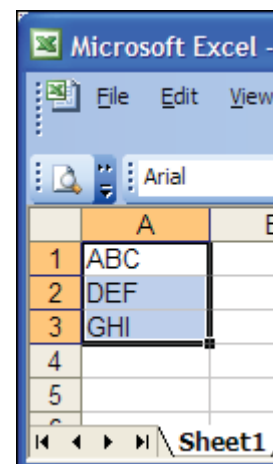
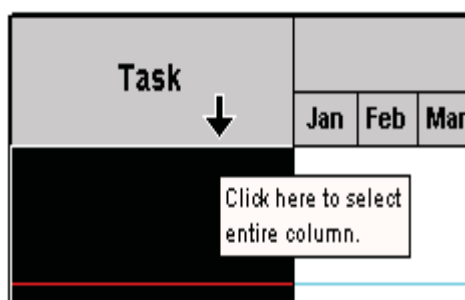
Paste Text and Numbers into Single Columns or Cells

Milestones Simplicity allows you to copy and paste single columns or cells of data into Milestones Simplicity columns.

Copy and paste text into column cells

If you have a column of cells or a single cell in another application, such as Excel, you can easily paste that data into any Milestones Simplicity schedule column.

1. In the other application, highlight and copy the column of text, as shown to the right.
2. In Milestones, select the column that will receive the text, as shown below. The **Selection** menu will display for that column.



3. Choose **Selection | Column Type and Format | More Column Options | Paste Column Text**. The results are shown to the right. Any text already existing in the column will be over-written with the pasted text.

Task	
ABC	Jan
DEF	
GHI	

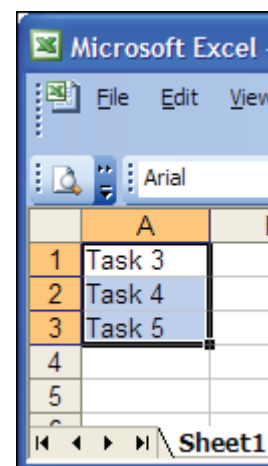
Copy and paste text into column cells below existing text

If you have a column of cells or a single cell in another application, such as Excel, you can easily paste that data into any Milestones Simplicity schedule column, below existing column text.

1. In the other application, highlight and copy the column of text, as shown to the right.
2. In Milestones Simplicity, click the  tool in the toolbox.
3. Click once in the cell below the existing text—pause—then click again to highlight just that cell, as shown below.

Task	
	Jan
Task 1	
Task 2	

4. Choose **Selection | Cell Text Settings | Paste**.
 - The results are shown to the right.



Task	
	Jan
Task 1	
Task 2	
Task 3	
Task 4	
Task 5	

Copy and paste text into a single column cell

You can also paste copied cells into a single column cell in Milestones Simplicity.

1. In the other application, highlight and copy the column of text (or single text entry).
2. In Milestones Simplicity, click the text tool  in the toolbox.
3. Click once in the cell in which the text should appear.
4. Choose **Selection | Cell Text Settings | Paste**.
 - The results are shown to the right.
 - Any text already existing in the column will NOT be over-written with the pasted text.

Task	
	Jan
ABC DEF GHI	

Copy and paste column text and numbers into other columns

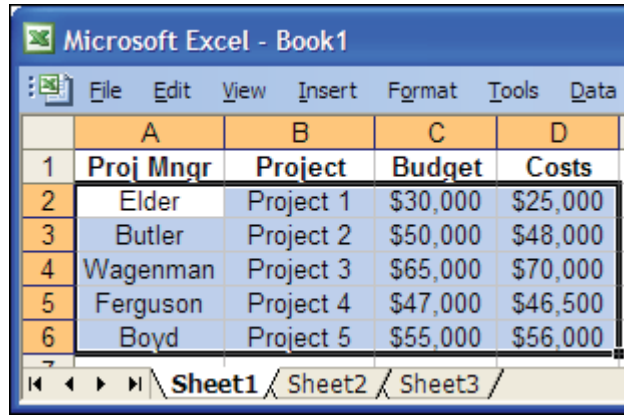
You can copy an entire Milestones Simplicity column to the clipboard by first selecting the entire column and then selecting **Selection | Column Type and Format | More Column Options | Copy Column Text**.

Once your column of text is on the clipboard, you can paste it into a spreadsheet, another Milestones Simplicity column, or any program that allows columns to be pasted in from the clipboard.

Paste Text and Values into Multiple Columns and Rows

Milestones Simplicity allows you to paste cells from a spreadsheet directly into the Milestones Simplicity column cells, across many rows.

1. In the other application, highlight and copy the cells, as shown below.



	A	B	C	D
1	Proj Mngr	Project	Budget	Costs
2	Elder	Project 1	\$30,000	\$25,000
3	Butler	Project 2	\$50,000	\$48,000
4	Wagenman	Project 3	\$65,000	\$70,000
5	Ferguson	Project 4	\$47,000	\$46,500
6	Boyd	Project 5	\$55,000	\$56,000

2. In a Milestones Simplicity schedule that is prepared to accept this specific data (i.e. the columns match the information in the spreadsheet), click the  tool in the toolbox.
3. Click once in the cell that will “anchor” the pasted information—pause—then click again to highlight just that cell, as shown below. This cell is where the pasting of information will begin.

In this example, the Excel spreadsheet has 4 cells horizontally and 5 cells vertically.

Project Manager	Project	2004						Budget	Costs
		Jan	Feb	Mar	Apr	May	Jun		
									
									
									
									
									
									

These cells will paste into Milestones Simplicity using that same pattern—4 cells across and 5 rows down.

4. In Milestones Simplicity, choose **Selection | Cell Text Settings | Paste**.

The results for this example are below:

Project Manager	Project	2004						Budget	Costs
		Jan	Feb	Mar	Apr	May	Jun		
Elder	Project 1							\$30,000	\$25,000
Butler	Project 2							\$50,000	\$48,000
Wagenman	Project 3							\$65,000	\$70,000
Ferguson	Project 4							\$47,000	\$46,500
Boyd	Project 5							\$55,000	\$56,000

Link and Embed Schedules in other Applications

Because Milestones Simplicity is an Object Linking and Embedding server, it is possible to paste entire schedules into other OLE compliant applications, such as the Microsoft Office applications.

Once embedded or linked, you can launch the schedule from that application, by double-clicking the schedule.

Embed a schedule in another document

An embedded schedule becomes a part of the document in which it is embedded. The embedded schedule is not linked to the original source schedule—meaning a change in the source schedule does not equate to a change in the embedded schedule.

1. In Milestones Simplicity, choose **Connections | Clipboard | Copy Schedule to Clipboard**.
2. In your other Windows document (Word, Excel, or any other OLE application), click **Edit | Paste Special**. The document's **Paste Special** dialog box appears.
3. Choose ☒ **Paste** and **Milestones Professional Schedule Object** and then click **OK**.
4. Close the Milestones Simplicity schedule used in Step 1, and then double-click on the embedded schedule. The schedule opens in Milestones.
 - If you make changes to the embedded schedule, then those changes will be retained in the embedded schedule in the Windows document (not the source file in Milestones) when the schedule is closed.

Link a schedule into another document

When a Milestones Simplicity schedule is inserted into a document as a “linked object,” a connection is maintained between the source schedule and the inserted schedule—meaning a change in the source schedule equates to a change in the schedule that was inserted in the document.

1. In your Windows document (Word, Excel, or any other OLE application), click **Insert | Object**.
2. Under the **Create New** tab, scroll down the **Object type** list, and choose **Milestones Professional Schedule**.

3. Under the **Create from File** tab, click the **Browse** button.
4. Locate the schedule, click once on it, and then click the **Insert** button.
5. ☒ **Link to file** and then **OK**. [Go to Step 9.]

-or-

6. In Milestones Simplicity, choose **Connections | Clipboard | Copy Schedule to Clipboard**.
7. In your other Windows document (Word, Excel, or any other OLE application), click **Edit | Paste Special**. The document's **Paste Special** dialog box appears.
8. Choose ☒ **Paste Link** and **Milestones Professional Schedule Object** and then click **OK**.
9. Double-click on the linked schedule.
 - The schedule will open within Milestones.
 - Changes to the source schedule will appear in the linked schedule.

Is linking or embedding the best approach?

Use linking if you want to automatically update the linked schedule in the destination document when the schedule is updated. Linking is the best approach if you need to maintain the schedule separately from the document you are including it in. Remember, however, that if you move a document containing links to other objects from your computer to another computer, you will need to re-link any linked documents.

Embedding is a better choice if you want to keep your document portable.

If different pages of the schedule need to be displayed in another document, then use neither linking nor embedding—instead paste each schedule page as a picture, as described in the following section.

Paste a Picture of the Schedule into another Application

When you only need a static image of the schedule, generate a metafile (enhanced picture) of the schedule and paste it into another application.

Compared to linking/embedding, metafiles take up less space in the other application's file, since just the picture is pasted and not the entire Milestones Simplicity file.

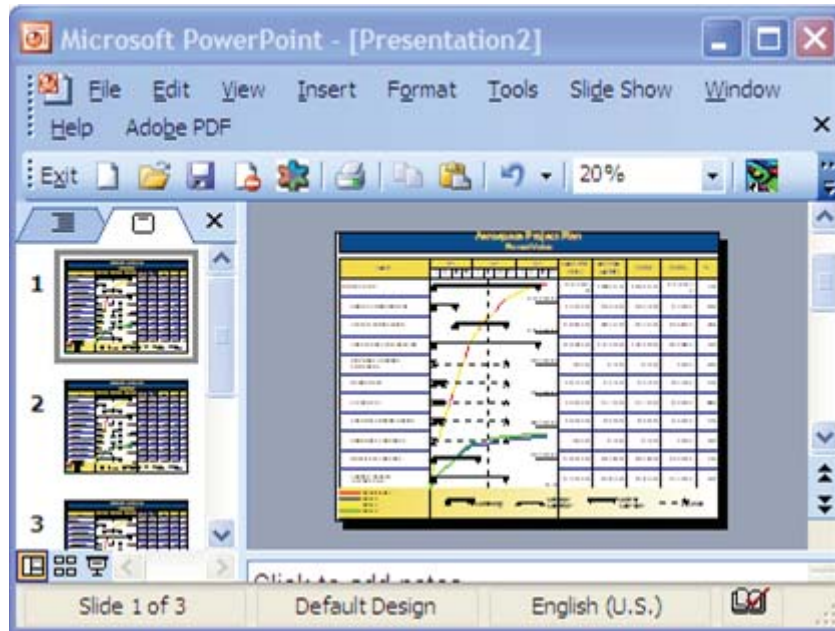
Further, linking and embedding do not support the inclusion of different Milestones Simplicity schedule pages in the target application.

1. Open Milestones Simplicity and the application in which the metafiles will be pasted.
2. In Milestones Simplicity, choose **Connections | Clipboard | Copy Metafile (Picture) to Clipboard**.
3. Click **OK** when the **Chart (metafile only) is now on the Clipboard** message appears.
4. In the other application (Word, Excel, etc.), choose **Edit | Paste Special**.
5. Choose **Picture (Enhanced Metafile)**, and then **OK**.
6. Resize the schedule graphic by clicking and dragging the image's corners and edges.
7. Repeat for other schedule pages in Milestones Simplicity.

Copy all Pages to PowerPoint

In addition to copying and pasting single metafiles of schedule pages, it is possible to copy all pages to a PowerPoint presentation with one click. PowerPoint 2000 or later must be installed.

1. Choose **Connections | Microsoft PowerPoint | Copy all pages to PowerPoint**.
2. You will be prompted to choose whether or not you would like the Milestones pages to be pasted in a new PowerPoint presentation or after the selected slide in an active (open) PowerPoint presentation. Choose **Yes** to create a new presentation; choose **No** to paste in the open presentation.



Chapter 9: Custom Formatting for Presentation

One of the key strengths of Milestones Simplicity is its excellent customization and presentation capability. Virtually every aspect of your schedule, including background colors, shading patterns, special fading effects, symbol colors, bar colors, and chart size can be customized.

Apply a template to quickly change the look of the schedule.

Charts and Templates

Templates retain the formatting (the “look” of a chart) while *charts* preserve schedule details (such as task names, dates, value entries, etc.) and the schedule format.

You can overlay a blank schedule (a chart) with a template and then fill-in the schedule data, or overlay an existing chart with a template.

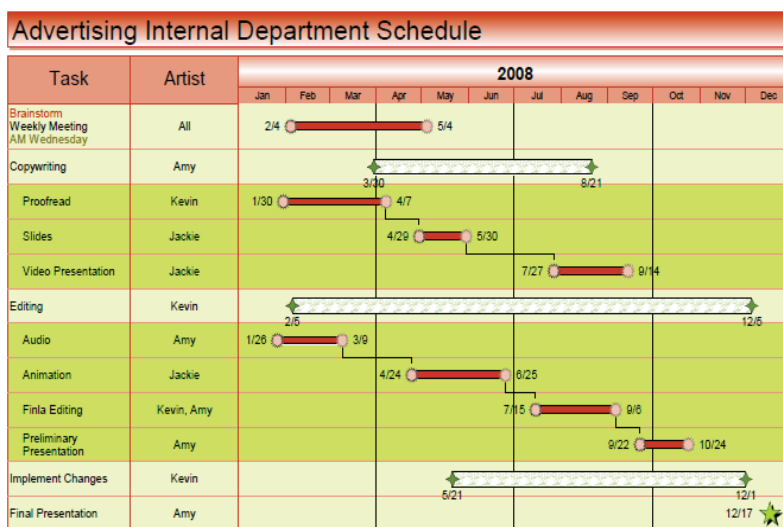
Standard Templates come with the software and can be applied at any time, even while using the **Milestones Simplicity Setup Wizard**, found by clicking **File | Files and Templates: Open and Save Options | Wizard**.

Personal Templates are user-created, saved, and then applied to charts.

When saving a file as a Personal Template or Standard Template, these elements of the schedule *are saved* with the template:

- The schedule layout - chart size, margins, column widths, legend height, rows per page
- Background color, frame and shadow
- Calendar icons in date SmartColumns
- Chart title text format and background format (but not the chart title text)
- Column headings and SmartColumn settings
- Current date line and text display
- Date headings and all timescale settings
- Date sensitivity options
- Default symbol size
- Default text styles
- Dependency mode setting
- Embedded graphics
- Gridline settings
- Legend entries and legend format
- Month and weekday name overrides
- Override Symbol Date and Text Display options
- Page number display
- Status line display toggle and properties
- Symbol date format Toolbox settings, including the size of the toolbox, and the symbols and bars used

When saving a file as a Personal Template or Standard Template, these elements of the schedule *are NOT saved* with the template:

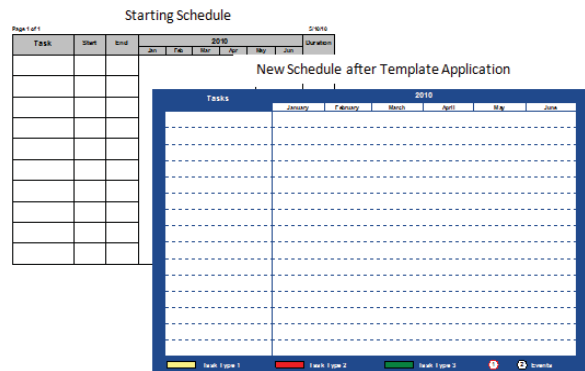


- Bookmarks
- Freeform text
- Graphics files that are not embedded
- Hidden menu items (this is a global setting applied to all schedules)
- Lines, circles or boxes drawn with the drawing tools
- Number and currency formats
- Schedule title
- Sidebar and toolbar shortcut button list (this is a global setting applied to all schedules)
- Symbols and bars on the schedule
- Task names on the schedule and any text entered into columns

Format a blank schedule with a selected template

Click File | Files and Templates: Open and Save Options | **New** to open a blank schedule.

Choose File | Files and Templates: Open and Save Options | Open ▼ | **Personal Template** or **Standard Template**. Click on the file name of the template you want and then click **Open** (an .MTP file).



Format an existing schedule with a selected template

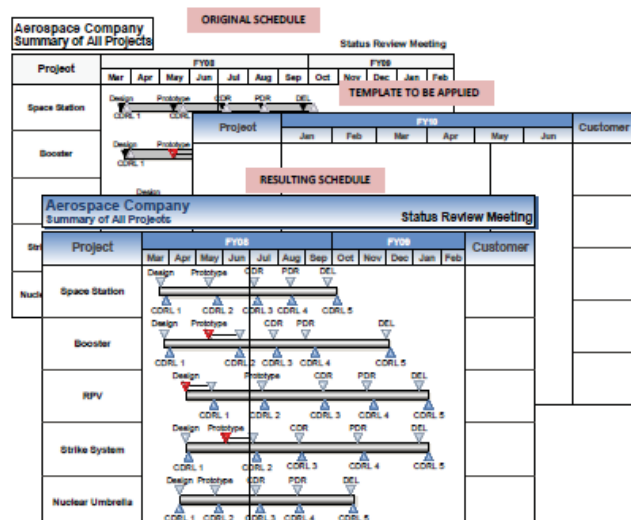
Open an existing schedule. Then open a template that instantly formats the schedule!

The columns in the existing schedule should match the column arrangement and column types in the template, as shown in the example below. The only exception: the template can have extra columns positioned at the far right or left.

The template's symbols replace those of the original schedule, according to their positions in the toolbox

To format an existing schedule (chart) with a template:

1. Open your schedule if it is not already open.
2. Choose **File | Files and Templates: Open and Save Options | Open ▼ | Personal Template** or **Standard Template**.
3. Locate the template (MTP file) that you want.
4. Click on the file name, and then click **Open**.



Setup Wizard templates

When starting a new schedule using the **Milestones Setup Wizard**, choose from dozens of ready-to-go schedule templates.

1. Choose **File | Files and Templates: Open and Save Options | Wizard**.
2. ☒ **Select Predesigned Template**
3. Under **Templates in current template folder**, select a template.
4. Choose **Next**, then enter a schedule title.
5. Choose **Next**, then select a schedule start date.
6. Click **Finish**.

Most templates have basic instructions on how to use the schedule. These instructions are in a freeform text box that can be deleted by clicking on the box once with the arrow tool and pressing the Delete button on your keyboard.

Create and save a template

Open a blank schedule and format it—see the beginning of this section for schedule areas whose format is retained by a template.

Or, open an existing schedule that is already formatted to your liking.

1. Chose **File | Files and Templates: Open and Save Options | Save As...** ▼ | **Personal Template**.
2. Enter a template name in the field labeled **File Name**.
3. If you wish to use this template as the default, choose **File | Files and Templates: Open and Save Options | Save As...** ▼ | **Standard Template** and name the template **default.mtp**.
4. Click **Save**.

If the template was saved as default.mtp, when you click **File | Files and Templates: Open and Save Options | New**, the new default template will appear.

Patterns and Gradient Fills

Patterns

In addition to the many symbol and bar shapes, you can also fill the symbols and bars with a wide variety of colors and patterns.

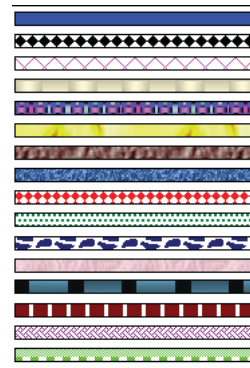
This sample shows some of the patterns for horizontal bars:

Marbled fill patterns are full-colored bitmaps which will ignore any color fill settings.

Use of marbled fill patterns increases the size of printer files and metafiles, especially on high-resolution printers. Thus, printing time may be increased.

Gradient fills

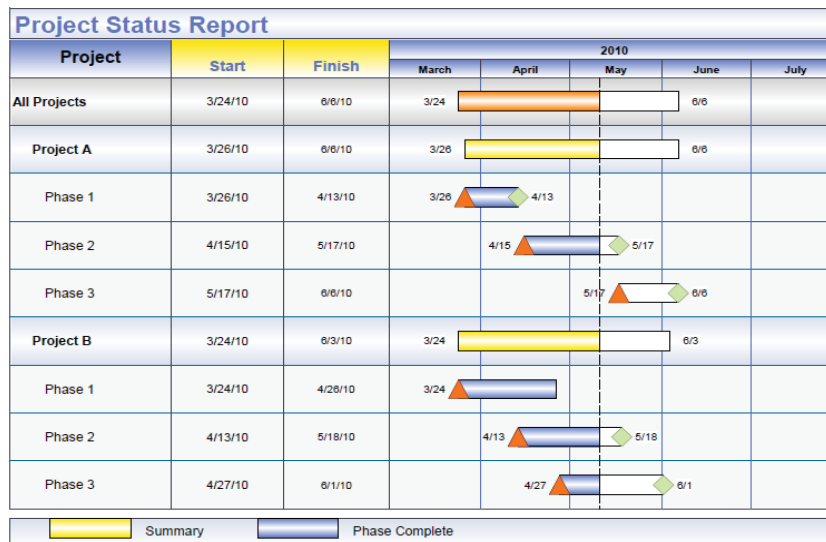
Gradient fills allow you to fade the background or fill color from one color to white, in many directions (to top, bottom, center, and more). These “special effects” can be chosen for many parts of your schedule, including horizontal bars, date headings, column headings, task shading, legends, and more, as shown below:



Task Gridlines and Shading Formatting

Milestones offers many task row gridlines and shading options, including:

- Default gridline and shading settings for all, only odd, or only even task rows. These settings are accessed in **Format | Gridlines | Horizontal Gridlines and Shading...**



- Override individual gridline and shading settings for selected task rows. These settings are accessed by selecting the rows to be overridden and using the **Selection** tab of the enhanced toolbar.

Horizontal gridlines and shading for entire schedule

You can customize the horizontal gridlines between task rows, as well as shade all task rows, selected task rows, or odd or even task rows.

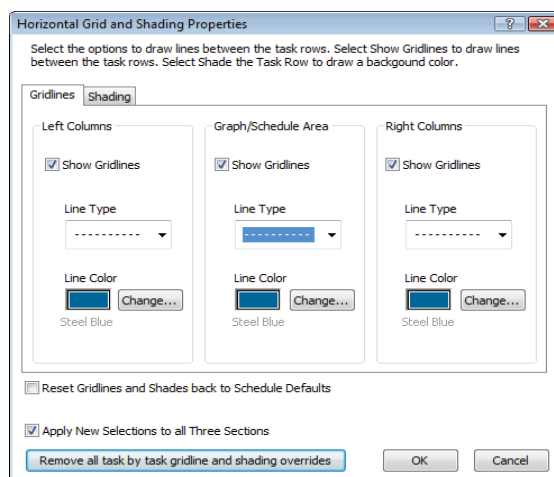
Horizontal gridlines between task rows

1. Choose **Format | Gridlines | Horizontal Gridlines and Shading** The following dialog box appears:
2. Click the **Gridlines** tab.

☒ **Apply New Selections to all Three Sections** to quickly format all three areas of the schedule—*Left Columns*, *Graph/Schedule Area* and *Right Columns*. Any choice in one section is applied to the other two sections.

OR choose from the following:

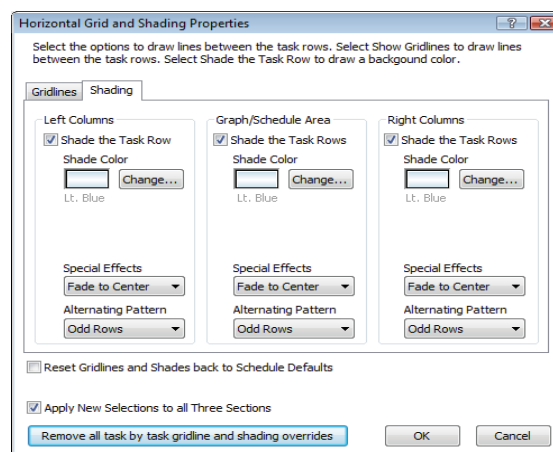
- ☒ Left Columns - all columns to the left of the schedule area



- ☒ **Graph/Schedule Area** - the area in which the symbols and bars are located
 - ☒ **Right Columns** - all columns to the right of the schedule area
3. Under **Left Columns**, ☒ **Show Gridlines** to display gridlines between tasks
 4. Under **Line Type**, choose a gridline pattern.
 5. Under **Line Color**, click the **Change** button and choose a gridline color.

Horizontal task row shading

1. Click the **Shading** tab.
- ☒ **Apply New Selections to all Three Sections** to quickly format all three areas of the schedule—*Left Columns*, *Graph/Schedule Area* and *Right Columns*. Any choice in one section is applied to the other two sections.
2. Under **Left Columns**, ☒ **Shade the Task Row** to shade task rows to the left of the schedule area.
3. Under **Shade Color**, click the **Change** button and select a background color.
4. Choose a **Special Effects** fading option.
5. Under **Alternating Pattern**, choose to shade only **Odd Rows** or **Even Rows**.
6. Click **OK** to apply the selections



Gridlines and shading for selected task rows

You can set the gridlines and shading options for specific task rows.

1. Click the arrow tool  in the toolbox.
2. While holding the **Ctrl** key, click once on the appropriate task rows (click in the column area). Use the **Shift** key to select a range of task rows. This will display the **Selection** menu.
3. Choose **Selection | Task Row Settings | More Task Row Options | Gridline/Shade**.
4. In the **Horizontal Grid Properties for Selected Task Rows** dialog box, make gridline and shading selections.

Column and Column Heading Shading and Text

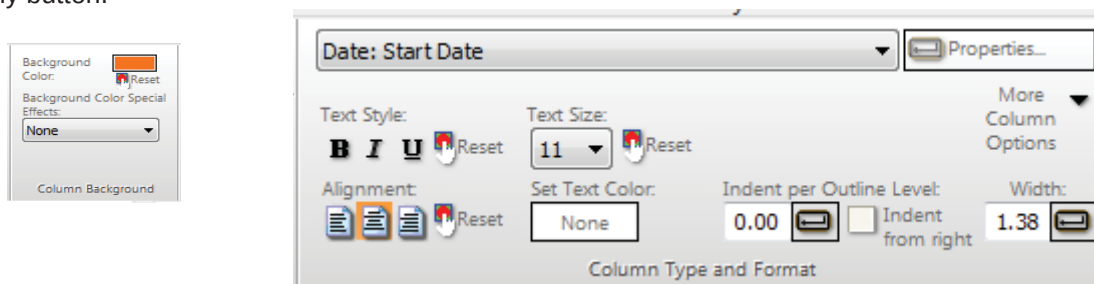
Set the shading and text properties for the columns and column headings.

Column text and shading

Change the default setting for text and values displayed in all columns (not column heading text) under **Format | Default Text | Column Text**.

To override the default column text and background settings for an individual column:

1. Click once on the column heading whose column properties you wish to change. This should display the **Selection** menu. Choose **Selection | Current Object: Column Heading | Switch to Column**.
2. In **Selection | Column Background**, choose the **Background Color**.
3. In **Selection | Column Background**, change the **Background Color Special Effects**.
4. In **Selection | Column Type and Format**, make selections for **Text Style**, **Text Color**, **Alignment**, and **Text Size** to override the defaults.
5. Under **Indenting per Outline Level**, enter a value in inches to indent the text by outline level. Press the  button.



Column text color override for individual column cell

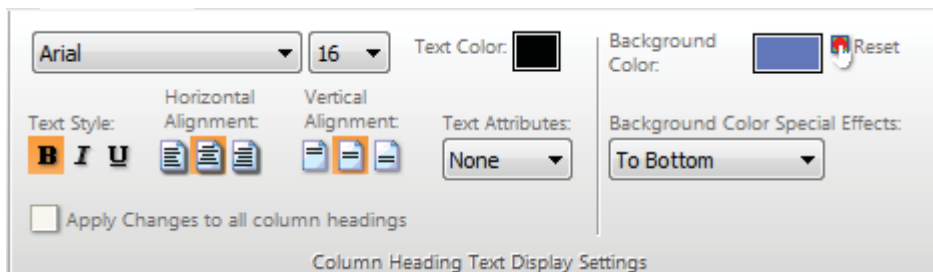
Text in column cells can be formatted for a specified color, on a line-by-line basis, for the first five lines in the cell.

1. Click the arrow tool  in the toolbox.
2. Click once on the column cell. This should display the **Selection** menu. Choose **Selection | Current Object: Task Row | Switch to Selected Cell**.
3. Choose **Selection | Cell Text Settings | Set Line by Line Text Color Overrides**.
4. For each of the first five lines of text in the column cell, choose an override color.
5. Choose **OK** to return to the schedule.

Project Status Repo	
Project	
Project A Phase 1 PM T.Jefferies	Marc 3/10 

Column heading text and shading

1. Click once on the column heading whose properties you wish to change. This should display the **Selection** menu.
2. In **Selection | Column Heading Text**, enter up to two lines of text. Press the  apply button.
3. In **Selection | Column Heading Text Display Settings**, make selections for **Text Style**, **Horizontal Alignment**, and **Vertical Alignment**
 - ☒ **Apply Changes to all column headings** to apply the format settings to all other column headings.
4. Choose a **Text Color**.
5. Select a **Size** for the column heading text.



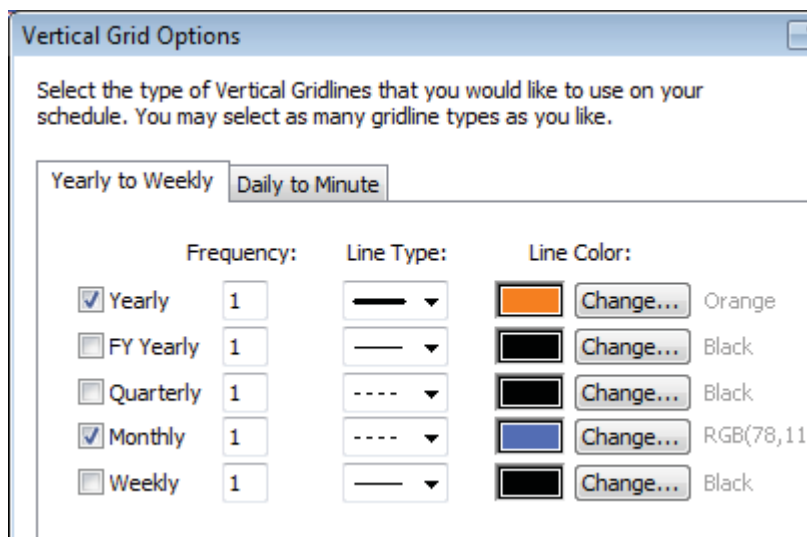
The dialog box shows settings for text and background color. The font is set to Arial, size 16, with black text color. The background color is blue. The text style includes bold, italic, and underline. Horizontal alignment is left, and vertical alignment is top. The background color special effects are set to 'To Bottom'. The 'Apply Changes to all column headings' checkbox is checked.

6. Next to **Background Color**, click the box to change the color.
7. Select **Background Color Special Effects** for fading,

Vertical Gridlines

Vertical gridlines are aligned along time boundaries (years, fiscal years, quarters, months, weeks, days, hours, minutes) and extend from the date heading to the bottom of the schedule.

1. Choose **Format | Gridlines | Vertical Gridlines**.
2. Check the gridline boundaries to display.
3. Choose a **Frequency**. For example, **Monthly** and a **Frequency** of 2 display a vertical gridline between every two months.
4. Choose a **Line Type** and a **Line Color**.



The dialog box allows selecting the type of vertical gridlines. The 'Yearly to Weekly' tab is selected. The 'Frequency' column shows options for Yearly, FY Yearly, Quarterly, Monthly, and Weekly, each with a frequency of 1. The 'Line Type' column shows options for solid, dashed, and dotted lines. The 'Line Color' column shows options for Orange, Black, and RGB(78,11) Black, each with a 'Change...' button.

Chapter 10: Distribute and Present Schedules

Milestones Simplicity schedules can be presented and distributed in a wide variety of methods and formats:

- Quickly format a schedule for presentation by applying a **template** (see Chapter 9).
- Print a **wall-size schedule** for viewing (see Chapter 7).
- **Copy and paste** a schedule to other Windows applications (see Chapter 8).
- Create **Internet-ready** documents containing your schedules.
- E-mail a Milestones Simplicity schedule to a client or colleague, who can then use the **free Milestones Viewer** to open and print the schedule, along with other functionality, without allowing editing rights.
- Finally, use the **Save to PDF** feature to create a PDF file that can be viewed with the free Adobe Acrobat® Reader or any other PDF viewer.

Publishing for the Internet/Intranet

Milestones Simplicity's built-in Internet Publishing Wizard gives you the following output options:

- Create a picture of each page of the Milestones Simplicity schedule.
- Create a single HTML document that contains a picture of each page of the schedule; a table of schedule data; the start and end date of the schedule; the schedule title; as well as symbol notes.

Graphics Output Options and Bitmap Options

All of the following settings are available in the **Internet Publishing Wizard**. When applicable, refer to these suggestions and explanations for making optimal choices.

- **Create a Bitmap for each page of the schedule** or **Include a bitmap of each page**: Generates a picture of each schedule page.
- **Bitmap Format** for the graphics output: PNG is usually the best choice if the image will be viewed with a browser. Not all browsers support BMP files. GIF is limited to only 256 colors, so any included bitmaps or gradient fills will degrade in quality. JPEG is a lossy format best suited for photos, not charts and graphs. All browsers support PNG (Portable Network Graphics) files; it is not limited to 256 colors; and is a lossless format; and is a good alternative to GIF. PNG files are about the same size as GIF files.
- **JPEG Compression** factor: A factor from 10 to 99 (or none). The lower the JPEG Compression number you select, the smaller the file will be. However, the image quality will degrade accordingly.
- **Image Scale** ratio: Determines how large the resultant bitmap is. 1.0 is full size according to the Page Size set in the **Layout** tab. 0.5 is 50% of the Page Size.
- **Graphic File Name Starter**: Adds a letter which prefixes all graphics file names, e.g. G0001.jpg.

Create a graphic only of each schedule page

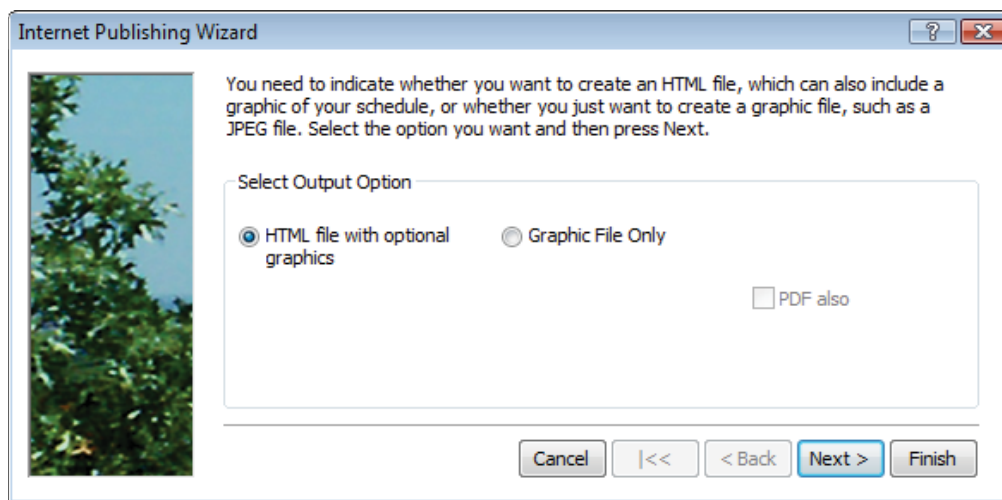
With the *Internet Publishing Wizard*, create a picture (bitmap) of each page of the schedule.

1. Choose **Connections | Other | Internet Publishing Wizard**.
2. Choose ☒ **Graphic File Only**, then **Next**.
3. ☒ **Create a bitmap for each page of the schedule** to create a graphic file for all schedule pages. ☐ to create a graphic file of the first page only.
3. See **Graphics Output and Bitmap Options** on page 10-1 for choosing **Graphic Output Options**. Choose **Next**.
4. Choose **Browse** to find a folder for the output files, then **Next**.
5. Review your selections and press **Finish**.

Create an HTML file with graphics

With the *Internet Publishing Wizard*, create a picture of each page of the schedule and display those graphics in a web page.

1. Choose **Connections | Other | Internet Publishing Wizard**.



2. ☒ **HTML file with optional graphics**.
3. Choose **Next**.
4. Click **Change** to choose a **Background Color** for the HTML page, then **Next**.
5. **Enter a Title** for the HTML page, then **Next**. For no title, just key an HTML command, such as `<br>`.
6. See **Graphics Output and Bitmap Options** on page 10-1 for choosing **Bitmap Options**.
7. Choose **Next**.
 - ☒ **Exclude Symbols from Task Table** to exclude symbol dates in the Task Table portion of the HTML file. The Task Table is a table of schedule data, with one row per task.
 - ☒ **Exclude Task Table from HTML File** to exclude the entire Task Table from the HTML file.
 - In the Task Table, all symbol dates for a row are shown after the column text entries. For example, if you have Start and End Date SmartColumns, then you would probably check *exclude symbols*, since they would just repeat the dates from the SmartColumns.

8. Choose **Browse** to select the file name and location for the HTML and graphics files. HTML files or images created that are based upon filenames that have blanks, will have underscores where the blanks were. This is done because some browsers cannot handle blanks in filenames.
 - ☒ **Exclude File Name from HTML File** to exclude the name of the Milestones file from the HTML file.
 - ☒ **Exclude Start and End Dates from HTML file** to exclude the schedule start and end date (as set under **Dates | Start and End Dates**) in the HTML file.
9. Choose **Next**.
10. Review your selections and press **Finish**.

When you do, the imaging and HTML process will begin. The Status Bar indicates the progress. When the process is complete, a Message Box appears asking if you want to view the output. If you press **Yes**, then your browser is started with the first HTML page created.

Free Milestones Viewer

Using the free Milestones Viewer, your clients and co-workers can view Milestones schedules. The free Viewer shares these features with Milestones Simplicity:

- Open a Milestones schedule.
- Full printing and preview options
- Right-click to view symbol notes.
- Copy a metafile of the schedule to the clipboard (then paste into another application).
- Target shared charts and symbols folders for better collaboration.
- Tooltip and hover time control
- Zoom controls
- Calendar mode

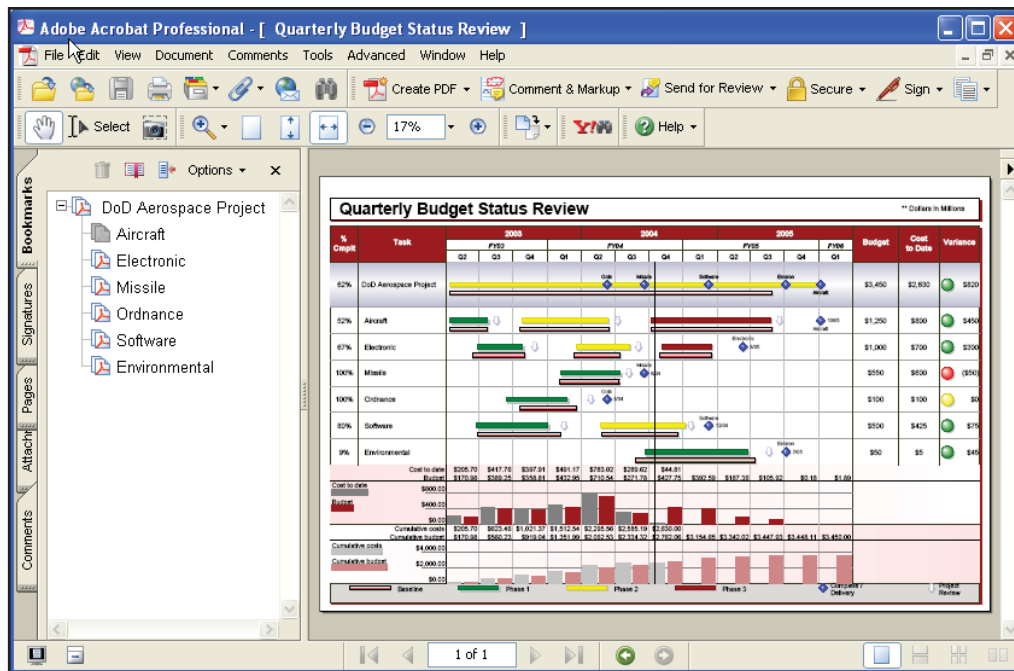
In the Viewer, schedules cannot be edited, nor can they be saved. Set folder locations, tooltip options, color settings, and more under **File | Preferences**. To Window-over to another schedule that is open in the Viewer, choose from other files listed at the bottom of the **File** menu.

Save to PDF

The Save option **Save As PDF** enables Milestones Simplicity to directly save to a PDF file. Users can create PDF files from a schedule without needing a PDF printer such as Adobe PDF®.

Simply select **File | Files and Templates: Open and Save Options | PDF** and enter a filename; then, when the file has been created, click **OK** to view the new PDF. Milestones will attempt to launch the file using the default PDF-viewer.

The PDF file automatically includes a bookmark section made up of any bookmarks in the schedule, and optional buttons for hyperlinks. Only the first hyperlink on each symbol or task row is included.



Appendix A: Quick Reference Tables

Scheduling Basics

TO ADD OR SET:

DO THIS:

Project step or other column text	Using the  tool, click in the column area and begin typing.
Symbol	Using the  tool, click once on the symbol in the toolbox to add, click and hold down the mouse in the schedule area, and drag.
Horizontal bar between two symbols	Using the  tool, click once on the left-most symbol. Click once on the bar type in the toolbox. Then, click once on the right-most symbol.
Vertical link	Using the  tool, click once on the “from” (top) symbol. Click once on the vertical link type in the toolbox. Then, click once on the “to” (bottom) symbol.
Task row, in-between two existing task rows	Using the  tool, select the task row above which you want to insert the new row. Choose Insert Rows, Columns New Task Row .
Current date line	Choose Dates Current Date from the menu.
Date headings	Click once on the date headings within the schedule with the arrow tool. This will display the Selection menu. Or choose Dates Date Headings .
Start and/or end date for the schedule	Choose Dates Start and End Dates to format. Click on the  icon to view the calendar.
Hours displayed	Choose Dates Start and End Dates More Settings . Then click the Hourly/Minute tab. Allow Hourly Detail , then enter the working hours and the hours to display.
To turn on date sensitivity	Click Dates Date Related Settings , then on Symbols: Fill to Status Date . Repeat for Bars: Fill to Status Date . This causes bars and/or symbols to display a white fill color after the current date..
Set up a column for indenting	Click once on the column heading. Choose Selection Switch to Column , then under Column Type and Format , enter a value for Indent per outline level . Press the apply button.
Change the outline level of task row(s)	Click the  tool. Select the task row you want to indent or outdent. The outline level settings are located under Selection Task Row Settings . To indent: click  , or press the Tab key. To outdent: click  , or press the Tab key.
Work and display weekends	Choose Dates Start and End Dates More Settings . Click the Weekly/Daily tab.
Work-week starting day	Choose Dates Start and End Dates More Settings . Click the Weekly/Daily tab.

Fiscal year starting month	Choose Dates Start and End Dates More Settings . Then click the Yearly/Monthly tab.
Page number format	Click the  tool. Click once on the page number at the top left part of the schedule. If the page numbers are not displayed, choose View Optional Items Page Number then repeat the above steps.

Adding Graphics, Text and Legend

TO ADD:	DO THIS:
Title	Select Insert Title Insert/Edit Chart Title .
Freeform text	Click the  tool. Click in the area you want to place the text, and begin typing.
Text to a symbol	Click the  tool. Click once on the symbol on the schedule. Click the Text tab.
Symbol notes	Click the  tool. Click once on the symbol on the schedule, then click the Notes tab. Symbol notes can be viewed by hovering over the symbol.
Current date, system date, page number, etc	Using the  tool, type: &date for the current chart date &sysdate for the computer date &curpage for the current page number &maxpage for the maximum page # &filename for the name of the chart &systime for the computer time
Line, box or circle	Using the  (line) tool, the  (box) tool or the  (circle) tool click and drag on the schedule to add a line, a box or a circle.
Legend	Choose Layout Legend Size and enter 1.0 (or more) for Enter Legend Height . Press the apply button.
Legend entry	Choose Insert Picture, Legend New Legend Entry .
Graphic	Choose Insert Picture, Legend Picture from File . Or, copy the graphic to the clipboard from another application. Choose Edit Paste Picture . Note: To convert a graphic file to an embedded graphic, click once on the graphic, then choose Selection Properties Convert to Embedded Graphic .
Column heading	Click once on the column heading and edit text.

Setting Up the Schedule Format

TO ADD OR CHANGE:	DO THIS:
Chart size	Choose Layout Page Size Chart Size .
Number of rows per page	Choose Layout Page Size Rows per Page

Page to a schedule	Choose Insert Page Insert a New Page before Current Page or Insert a New Page After the Last Page .
Column	Choose Insert Rows, Columns New Column .
Background color or frame options	Choose Format Frame, Highlights Background color, border, frame corners .
Margins	Choose Layout Page Size Margins .
Column width	Using the  tool, click and drag on the column edge with your mouse.
Date format for symbol dates	Choose Dates Date Related Settings Set Symbol Date Format .
Date headings	Click once on the date headings. Or, click Dates Date Headings .
Gridlines	Choose Format Gridlines Horizontal Gridlines for entire schedule . Then choose the Gridlines tab.
Shading	Choose Format Gridlines Horizontal Gridlines for entire schedule . Then choose the Shading tab.
Weekend shading	Choose Format Vertical Shading Weekend Shading...
Default symbol size	Choose Format Frame, Highlights Symbol Size .
SmartColumns	Choose Insert Rows, Columns New Column , or click once on an existing column heading, choose Switch to Column Heading , then use the drop down menu under Column Type and Format to choose one of the <i>SmartColumn Definitions</i> .
Default text styles	Choose Format Default Text .
A page break	Click the  tool. Right-click the task row you want at the top of the next page, and then click Insert Page Break .

Making Changes

TO CHANGE:	DO THIS:
A legend entry	Click once on the legend entry you want to change. To move a legend entry, use the  tool. Click on the legend entry, drag to the new location and drop.
Bar(s) to a new type	Using the  tool, select the left-most symbol (or in the case of vertical links, select the symbol from which it originates). Click once on the new bar type in your toolbox.
Symbol(s) to a new type	Using the  tool, select the symbol(s) to be changed (hold down Shift to select more than one symbol). Next, click once on the new symbol type in your toolbox.
The dates of a group of tasks linked	Choose Dates Date Related Settings Dependency Mode . A check by Dependency Mode indicates that it is turned on. Then, use the  tool to click-and-drag a symbol. All dependent symbols will move by the same amount.

Dates of all the milestones on your schedule	Choose Dates Date Range Tools Shift all task dates to shift all symbol dates forward or backward by a specified number of days.
Text size of an individual symbol	Click the  tool. Select the item to be changed. Next, choose the Text tab and change the Size or Color .
Individual symbol color	Click the  tool. Select the symbol on the chart. Next, choose the Size/Color tab and change the Symbol Fill Color .
The date of a milestone symbol	Click the  tool. Then click-and-drag the symbol on the schedule. Or, click once on the symbol you want to change. Enter a new date under Selection Current Object: Symbol (1 Selected) . Or, click the  tool. Click once on the symbol on the schedule and release the mouse button. Hold down the Shift key and press the left or right arrow keys.

Making Changes - Deleting Items

TO DELETE:	DO THIS:
Symbol(s)	Click the  tool. Select the symbol to be deleted. Press the Delete key on your keyboard. To delete several symbols at once, hold down the Shift key while selecting the symbols. Then press the Delete key.
Horizontal bar(s)	Click the  tool. Right-click the symbol on the left most end of the bar. Click Clear Horizontal Bars .
Vertical link(s)	Click the  tool. Right-click the starting symbol for the vertical link. Click Clear Vertical Links .
Task row(s)	Click the  tool. Right-click a task row. Then click Delete Task(s) . To delete several task rows, hold down the Shift key while selecting the task rows and then press the Delete key. To delete several non-contiguous task rows, hold down the Ctrl key while selecting the task rows and then press the Delete key.
Legend entry	Using the  tool, click once on the legend entry you want to delete. Press the Delete key.
Column	Using the  tool, select the column you want to delete. Press the Delete key.
Page on your schedule	Choose Edit Delete Current Page .

Customizing Milestones Simplicity

TO CUSTOMIZE:	DO THIS:
The starting template	Create the format you need, including customization of your toolbox and page layout.

Click **File | Files and Templates: Open and Save Options | Save As...** Next, click **Standard Template**. Save the schedule with the name *default*.

mtp. From now on every time you click  New, a blank schedule template using your format and toolbox settings will be displayed.

The default file locations

Choose **Tools | Program Options | Folders**. Click the **Browse** button to set the default locations.

A bar in your toolbox

Double-click on a horizontal bar or vertical link in the Toolbox.

A symbol in your toolbox

Double-click on a symbol in the toolbox.

The toolbox size, other options

Double-click on the word Toolbox and choose the number of symbol/bar/symbol combinations, and other options.

Month and week day names

Choose **Format | International | International, Number, and Currency Settings**. Pick from *Month Names*, *Weekday Names*, and *Page n of n*.

Working with Other Applications

TO DO THIS:

DO THIS:

Copy a picture of the schedule to a document

Choose **Edit | Copy Schedule | Copy Metafile to Clipboard**. In your other application, click *Paste Special*. Choose *Enhanced Metafile*.

Embed a schedule into another document

Choose **Edit | Copy Schedule | Copy Schedule to Clipboard (OLE)**. In your other Windows application, click *Paste Special*.

Or, locate the schedule using Windows Explorer. Click and drag the schedule name to the other application's window and release.

Copy a schedule with transparent background

Before copying the schedule to the clipboard, choose **Format | Frame, Highlights | Background, color, border, frame corners**. Uncheck **Include on Prints and Metafiles**.

Printing Your Schedules

TO DO THIS:

DO THIS:

Print the schedule using the default settings

Choose **File | Printing | Print** .

Print the schedule and choose options

Choose **File | Printing | Printing Options**.

Print a large chart on one sheet

In the **Printing Options** dialog box, choose **Scale to Fit Selected Paper Size**.

Print a large chart in "pieces"

In the **Printing Options** dialog box choose **Use Specified Size**.

Enlarge a small schedule to fit on a larger paper size

In the **Printing Options** dialog box, choose **Scale to Fit Selected Paper Size**.

Scale your schedule by horizontal and vertical scaling factors you set

Print color schedules on a black and white printer

Print all open schedules

Set up your printer

Exclude certain columns when printing

Print symbol notes on a separate page

Print your schedule by time period.

Print a certain date range

In the **Printing Options** dialog box, choose **Use Custom Scaling Specified**. Next, enter a scaling factor for Horizontal and Vertical.

In the **Printing Options** dialog box, ☒ **Print Colors in Shades of Gray**.

Choose **File | Printing | Print All Pages**.

Choose **File | Printing | Printer Setup**



In the **Printing Options** dialog box, choose the **Exclude Columns** tab. Check the columns to exclude from printing.

In the **Printing Options** dialog box, ☒ **Include Symbol Notes Page**.

In the **Printing Options** dialog box, click the **Print** tab.

☒ **Print Using the Time Periods Below**. Next, choose a frequency from the left list box and a time period from the right list box.

In the **Print Options** dialog box, click the **Print** tab.

☒ **Print Date Range Below Only**. Next, specify both a start date and an end date for the range you want to print.

Appendix B: Support and Where to Get More Information

Help Reference Information

Milestones Simplicity offers extensive reference information in an easy-to-use manner. In fact, the Milestones Simplicity Help Topics contain more detail than this manual.

To access the reference information, just choose **Help | Help Files | Help Topics**. Browse the **Contents**, or search for keywords under the **Index** tab. Help is well organized and extensive, giving you precise answers and instructions.

Online Support

Choose **Help | Internet Support** for a list of useful links to our website, including the main support page, sample schedules, our online Q&A database, the latest news, and more.

E-Mail Support

You can e-mail us at support@kidasa.com with any questions or suggestions that you may have. We try to answer e-mail questions 7 days a week.

Technical Support by Telephone

You can call us at 512-328-0168 between 8:30 am and 5:00 pm Central Time on normal workdays.

There is no charge for technical support.

Web Site

Our web site is at <http://www.kidasa.com>. It contains a significant amount of information: white papers, question and answer sections, movies, samples, and additional documentation.

Movies

Choose **Help | Internet Support | Online Movies** to go to our movies page on our website.

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